PixelPoint BackOffice Manual

Table Of Contents

Publication Details 1

Welcome 3

- What's New 5
- PixelPoint POS Version 8 5

BackOffice Manager 9

System Concepts 9

- Setup Overview 9
- Programming Changes 12
- Navigation Bar 13
- Active And Inactive Records 15
- Printing Concepts 16
- Naming Printers 16
- What Is A Printer Channel 16
- Determining Printer Channels 17
- Print Consolidation 18

Reports 19

- Report Viewer 19
- DataMiner 23
  - What is Data Mining? 23

Employees 25

- Employee Concepts 25
- Setup Employees 26
  - Advanced Tab 28
  - HR Tab 29
- Time-Clock Manager 31
- Scheduler Features 33
  - Task Bar 33
  - Setup 35
  - Setup Shift Types 37

Schedule Tab 38
Cell Definitions 39
Adding A Shift 40
Scheduled Shift Times Tab 43
Adding/Modifying A Shift 43
Menus & Products 44
Product Concepts 45
Product Setup 46
Product Types 52
Custom Tab 55
Recipe Tab 57
Advanced Tab 59
Feature Codes 65
Forced Questions 68
Combos 73
Menu Setup 75
Members 79
Member Concepts 79
Search Tab 80
Member Info Tab 81
Notes Tab 83
Stats Tab 84
Internet Tab 86
Reservations 87
Setup Coupons 90
Advanced Tab 92
Inventory 95
Inventory Without StockBoy 95
Stocked Items 98
Advanced Tab 100
Sub-Recipe Tab 102

How To Make Tab 103
Supplier Setup 104
Warehouse Setup 105
Station Depletion By Warehouse 105
Inventory Manager 107
Purchase Orders 111
Stock 116
Waste & Spillage 118
Mail 120
Send Mail 120
Response Mail 122
BackOffice Administrator 125
System Concepts 125
Setup Overview 125
Programming Changes 128
Order Of Programming 129
Navigation Bar 131
Active And Inactive Records 133
Printing Concepts 134
Naming Printers 134
What Is A Printer Channel 134
Determining Printer Channels 135
Print Consolidation 136
Administrator 137
Setup System 138
System Tab 138
System Taxes Tab 141
Company Info Tab 142
POS Reports Tab 143
Preset Payment Tab 145
Orders Tab 149

Defaults Tab....151
Collaboration Tab....153
Email Tab....155
Station Options Tab....156
Printer Ports Tab....159
Fonts Tab....161
Advanced Tab....162
Receipt Setup Tab....166
Setup Revenue Centers....167
Setup Sales Type....168
POS Functions....170
Setup Payment Methods....171
Advanced Tab....173
Order Templates....175
Customizing The Order Template....177
Custom Function Buttons....178
Setup Printer Channels....180
Setup Printer Codes....181
General Tab....183
Print Filter....185
Sort Order Tab....186
WebToGo Concept....188
Specifications....188
Concept....188
Order Status....189
WebToGo Website Setup Tab....190
WebToGo Defaults Tab....191
WebToGo Pictures Tab....193
WebToGo Location Tab....194
WebToGo Web Colors Tab....195
WebToGo Hours Tab....196

WebToGo Web Bricks Tab 197
WebToGo Welcome Message Tab 198
WebToGo Bottom Text Tab 199
WebToGo Location Lists Tab 200
WebToGo Coupons Tab 201
WebToGo Web Receipt Tab 202
WebToGo Processing Delay Tab 203
WebToGo Payment Options 205
WebToGo Misc Setup 206
Product Setup 206
Member Setup 207
Coupon Setup 208
Order Page Setup 209
Table Setup 211
Setup Table Sections 211
Table Settings 213
Setup Table Layout 214
Tool Bar 214
Tagging Tables 216
Sections 217
Background 217
General Setup 219
Setup Receipt 219
Mealtime Setup 220
Pay In/Out Reasons 221
Setup Billboard Message 222
Banner Message 223
Weather Conditions 224
DataMiner Client 225
Members/VIP 229
Setup Member Groups 229

Setup Companies 231
Setup Delivery Zones 232
Employees 233
Setup Departments 233
Employee Performance Points 234
Setup Job Positions 235
Advanced Tab 236
Setup Security Levels 238
Security Level Definitions 239
Shift Rules 243
Where Shift Rules Are Applied 247
Collaboration 249
Products 250
Order Page Setup 250
Report Category Setup 252
Summary Group Setup 254
Multi Menu Setup 255
Refund Reasons 256
Exit Setup 258
Glossary 259
Index 261

Publication Details

Documentation Details

This document was developed by PAR Technologies, PixelPoint Software Group. For content revisions, questions, or comments, contact the writers at publications@pixelpointpos.com.

Copyright

© PAR Technology Corporation 2006. All rights reserved. This product and related documentation are protected by copyright and are distributed under licenses restricting their use, copying, distribution and decompilation. No part of this product or related documentation may be reproduced in any form by any means without prior written authorization of PAR Technology and its licensors, if any.

Version

Version 8.0
April 2006
Printed in Canada

Trademarks

PixelPoint, PAR, the PixelPoint Logo, the PAR logo are all registered trademarks of PAR Technology Corporation.

PAR PixelPoint may have patents, patent applications, trademarks, copyrights, or other intellectual property rights covering subject matter in this document. Except as expressly provided rights covering subject matter in this document. Except as expressly provided in any written license agreement from PAR PixelPoint, the furnishing of this document does not give you any license to these patents, trademarks, copyrights, or other intellectual property.

Other product names may be trademarks or registered trademarks of their respective companies and are hereby acknowledged.

Disclaimer

PAR PixelPoint has thoroughly reviewed this document, and is believed to be reliable. However, this document is provided for informational purposes only and PAR PixelPoint makes no warranties, either express or implied, in this document. Information in this document is subject to change without notice. The entire risk of the use or the results of the use of this document remains with the user.

Technical Support

Technical Support is available to Reseller and Business Partners with support contracts directly from PAR PixelPoint. Customers with a valid technical support contract and a Web

Access code can request technical support electronically on the PixelPoint Support or Partner Portal web sites.

Document Revisions

Revisions to this document are posted on the PixelPoint Partner Portal. Check with your PixelPoint Reseller for current PixelPoint product information. Further information can be acquired through the official web site: www.pixelpointpos.com

Contact

PAR - PixelPoint
688 Chrislea Road
Vaughan, ON CANADA
L4L 8K9

905 264-9808 Direct
905 264-1423 Facsimile
800 26-PIXEL (800-267-4935) Sales

Welcome

Thank you for using PixelPoint POS.

Within the contents of this manual, you will find information pertaining to back-office operations; specifically, how to program a point-of-sale (POS) system using PixelPoint's BackOffice program.

The contents of this manual are divided into two sections: BackOffice Manager and BackOffice Administrator.

The Manager section covers basic functions commonly required for on-going back office operations, such as how to add an employee, member or product. The Administrator section covers more advanced functions that would be required for programming specific applications.

Within the Administrator section, each pull-down menu is presented as a separate section. They are then divided into sub-sections, presenting each selection within the given menu. For example, the menu selections contained within the Administrator Menu will be grouped under that title and presented in the order they appear within that menu. Some menu selections contain multiple tabs. Depending on the length of information, the sub-section may be divided further, separating the contents of each tab. For example, Station Setup is further divided so each tab has its own separate topic. If the desired topic is not present, it will be found within the Manager section because it is a basic function.

This manual is intended for the person programming the POS system. This would typically be either the Systems Administrator or PixelPoint Installer/Programmer. It is written with the assumption that the PixelPoint POS system has already been installed.

For information pertaining to front-end operations, please refer to the PixelPoint POS User's Guide. For information pertaining to installing the software, please refer to the PixelPoint POS Installation Guide.

What's New

PixelPoint POS Version 8

Overview

This section summarizes pertinent changes to major features and functions in PixelPoint POS Version 8. Details of each are located in their respective sections throughout this manual.

Forced Question

- **Custom Answer Pricing** - The forced question screen allows you to apply a specific price level to an answer within a forced question.

- **Ask At Once** - This feature combines multiple forced questions into one screen display.

Further information regarding these enhancements can be found in the *Forced Questions* section.

BackOffice News Support

You can receive the latest product news and information directly from PixelPoint. This information will show up in BackOffice. Further information regarding these enhancements can be found in the *Setup Overview* section.

Company Info Tab

A new information tab has been added to Setup System (under Administrator) called Company Info. This tab contains the address and contact information for the establishment. It is used in two areas: First, it will be applied to Member Invoices. Second, it will be used as the source address when generating delivery driver maps.

Employee Schedule

The employee schedule program has been enhanced to allow the copying of all employee schedules from the previous week. You can also email those schedules. Configuration for emailing is applied in a new tab within Setup System. Further information regarding these enhancements can be found in the *Employee Scheduler* section.

General Enhancements

- **Employee Record** – Cell Phone # field has been added.

- **Job Positions** – There is a new check box called 'Do Not Send POS Announcements'. This will prevent messages such as Sold Out / Sold In from coming across to people in this job position.

- **Pay In/Out Reasons** – There is a new check box for opening the cash drawer if that reason is selected.

Online Help

Online Help for PixelPoint has been updated and is context-sensitive.

Inventory Stock Items

- **Descriptors** - Stock items can use pre-existing descriptors rather than create new ones every time.
- **Multiple Suppliers** - You can now apply multiple suppliers to a single stock item.
- **Sub-Recipe Tab** – A new tab called Sub-Recipe has been added to the stock item screen to allow you to apply recipe within a recipe.
- **How To Make Tab** - You can now apply item information to stock items.

Inventory Manager

- **Display Screen** - The yellow icon bar is now customizable just like in BackOffice. Pulldown menus have been added to the top of the screen.
- **Add Batch Recipe** - This new function simplifies the application of a batch recipe (an item containing a sub-recipe) to inventory.
- **Add Spillage/Waste** - This function allows you to apply spillage/waste adjustments to inventory in one easy step.

DataMiner Version 4

PixelPoint DataMiner has been updated to provide a user-friendly environment for data analysis and reporting. Several key features to DataMiner are as follows:

- **Integration** - DataMiner is accessible through BackOffice under the General Setup pull down menu.
- **Simple View** – This has been enhanced to provide a view that is more easier to view and work with.
- **Report View** – A new report tab will be made available offering the report contents in a pre-formatted layout much like the example below.

Labor

- **Job Positions** - Two new fields have been added to Job Position Setup which allow you to apply minimum and maximum allowable pay rates. If you attempt to apply a pay rate to an employee record that is outside of these parameters, the system will prevent this.

- **Shift Rules** - A new selection has been added to the Employees pull down menu in BackOffice called Shift Rules. This function allows you to set labor parameters relating to breaks (paid & unpaid), employee meal times and overtime. You can have multiple shift rules and apply them globally, to everyone within a certain job position, or to individuals. This is tied into a new Rules Status button available on the front-end in the Employee Time Clock screen.

- **Extended Employee Information** - Additional fields and a Human Resources tab have been added to Employee Setup.

- **Time Clock Manager** - This screen has been enhanced to allow you to insert new shifts from scratch including breaks. These records are also stored sequentially by date.

- **Pay Period Definitions** - New fields have been added to the Setup screen within Employee Scheduler which will prevent editing of shifts from a previous pay period.

BackOffice Manager

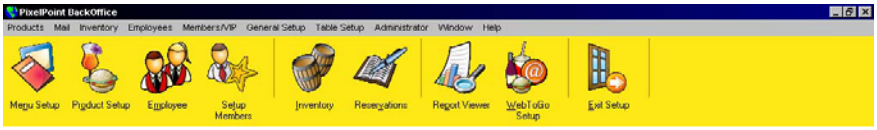
System Concepts

Setup Overview

You can access BackOffice by one of two ways:

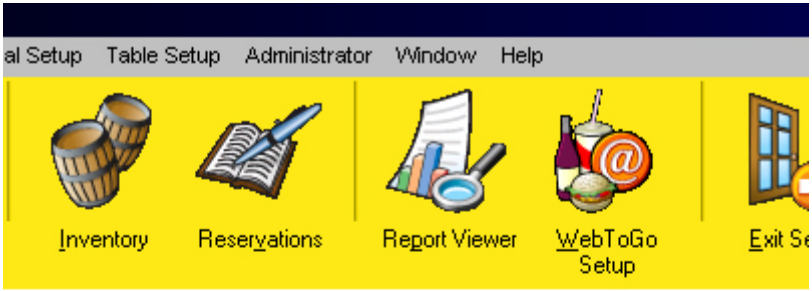
1. From the POS front-end. Select the [Manager] button from the Table Layout screen. Within that menu, select [System Setup].
2. From Windows desktop. Select [Start], [Programs], [PixelPoint POS] and [POS System Setup].

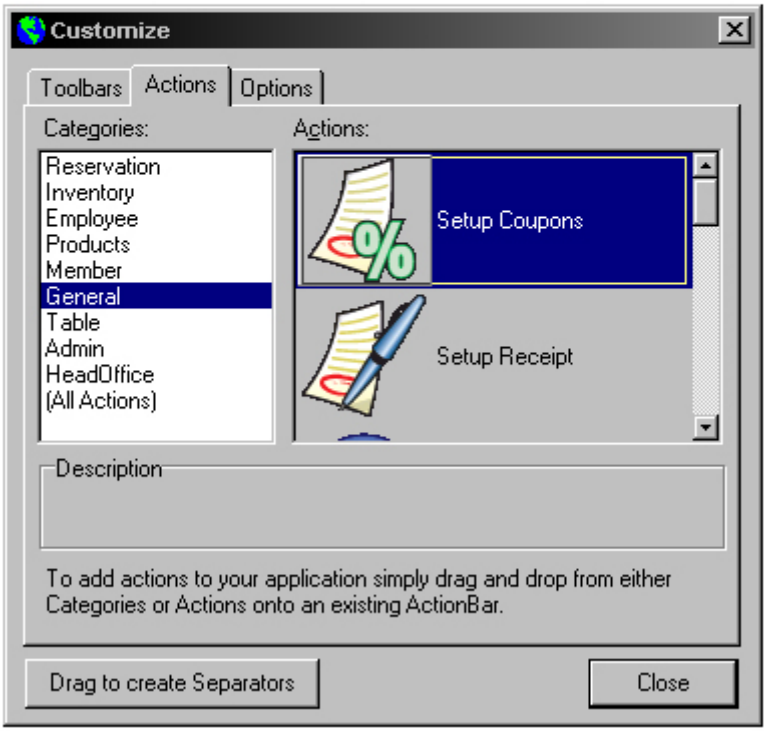
You can also create a Windows desktop shortcut for \\posserver\pixelpos\systemset.exe.



The screen is comprised of two sections. The first is a selection of pull-down menus listed across the top of the screen (see below).

The second is the yellow tool bar which contains shortcut icons to the various programming functions contained in the pull-down menus. You can customize this toolbar by right-clicking on the yellow area.





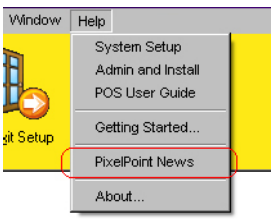
A window will appear. To remove an icon, click and drag it to this window. To add an icon, select it from the Actions window and click and drag it to the tool bar. You can also arrange the tool bar icons by clicking and dragging them to the desired location.

BackOffice News Support

You can receive the latest product news and information directly from PixelPoint. This information will show up in BackOffice. It requires that the server be connected to the Internet.

PixelPoint BackOffice
Products Mail Inventory Employees Members/VIP General Setup Table Setup Administrator Window Help
Menu Setup
Product Setup
Forced Questions
Employee
Inventory
Report Viewer
Exit Setup
PAR PixelPoint.
News Releases
News & Events
Latest News
Corner Bakery Cafe® Selects PAR Technology's PixelPoint Software and Industry Leading Hardware Platform
[More]
Current Releases
10.26.05 PixelPoint Technologies, Inc. Acquired by PAR
08.08.05 PixelPoint to be Acquired by PAR Technology Corporation
07.29.05 Hospitality college Teaching Students about PixelPoint POS
06.06.05 Serious Coffee® Rolls out PixelPoint HeadOffice™
04.06.04 New Partnership Closes the gap between POS and Financial Accounting
03.02.04 Papa Murphy's Franchisee Rollout PixelPoint
02.12.04 Salisbury House successfully completes roll out of PixelPoint's Enterprise POS
Pixel News
PixelPoint POS
Backoffice
March 2, 2006
Supervisor

Pixel News is activated within BackOffice under the Help pull down menu.



This screen offers information such as press releases and news related to new features and functions.

Online Help

Context-sensitive help is available throughout BackOffice. Simply right-click on the screen in question and select Help.

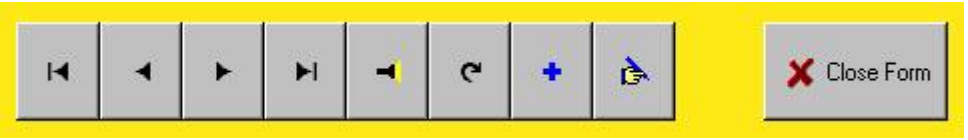
Programming Changes

Displayed across the top of the BackOffice screen is a list of pull-down menus (see below).

When applying programming changes to each of these sections, most updates will apply at the front-end upon going to the login screen. However some of the higher-level settings involving system configuration may require that you restart the PixelPoint POS system, before the change can take place. The general rule for these is as follows: If the change is made under the *Administrator menu,* then you must *restart the POS* for the change to take affect.

For example, adding a new coupon would only require that the front-end user log out. Upon logging back in, the coupon would be present. But if you were to add a station or change a printer's configuration, the system would have to be restarted in order for such changes to take affect.

Navigation Bar



Throughout BackOffice, you will see this navigation bar. It will help guide you to the desired database record and also allow you to add and edit records. The function of each button is as follows:

Move to the first record in the file.

Move to the previous record in the file.

Move to the next record in the file.

Move to the last record in the file.

Search all records. This presents them in a database table format.

Refresh the display.

Add a new record.

Edit the current record.

Leave this function.

Save the change (edit mode).

Cancel the change (edit mode).

Active And Inactive Records

You do not delete database records from the PixelPoint database, you set them as inactive.

In many of the setup screens, you will see this check box located in the upper right corner. If you wish to remove a record (be it an employee, product or whatever), simply retrieve the record, then un-check this box. The record will no longer display.

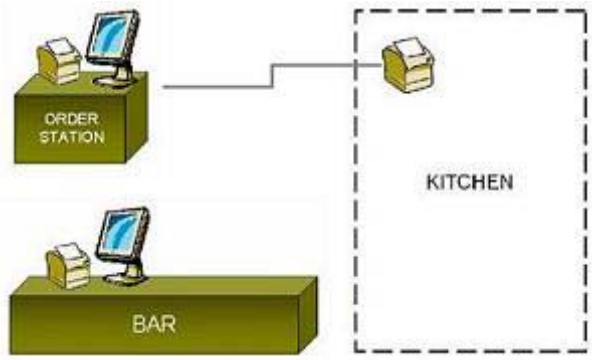
Should you find it necessary to reinstate an inactive record, go into BackOffice and select the [Window] menu.

Un-check [Show Active Records Only]. You will now be able to view and edit inactive records. Check the [Is Active] box to re-activate the record.

Printing Concepts

Naming Printers

In the example below, the establishment has two stations and three printers. The POS unit at the order station is Station 1. The POS unit at the bar is Station 2. The printer in the kitchen is connected to Station 1.



It is recommended that you name printers by their primary function followed by the station number they are connected to. In this case, the primary function of the printer at the order station is transaction-oriented printing (such as receipts, charge slips, cash out reports). Printing of this nature is localized to the station, so we refer to its primary function as being Local printing. Therefore the name of this printer is **LOCAL1** (Local being the primary function and 1 being the number of the station it is connected to).

Similarly, the printer at the bar performs local printing for Station 2. However, it may also serve a secondary purpose in that beverage orders from Station 1 may print here as well. This is referred to as remote printing in that it is performed on a printer that is not local to the station that initiated the print. In this case, the primary function will not be local printing but bar printing. So we call this one **BAR2** (Bar being the primary function and 2 being the station it is connected to).

Following this same theory, the printer in the kitchen generates the kitchen (or food) orders. It is also connected to Station 1, therefore we name it **KITCHEN1** (or Food1).

What Is A Printer Channel

A printer channel is a pre-defined path an item will take when it is being printed. Think of it like a highway in which you have lanes for specific types of vehicles (such as one for food trucks and one for beverage trucks). While the destinations may vary, the lane (or path) they take is specifically intended for that type of vehicle.

Printer channels work the same way. An order containing food and beverages is sent. The food will take one channel, likely to the kitchen, and the beverages will take another path which would likely be to the bar.

Bear in mind that a channel could have multiple destinations. For example, a Martini is ordered and sent. It will follow the Bar channel, but the establishment may have more than one bar. The destinations are assigned within Station Setup. In this example, if the Martini is ordered from Station 1, it may go to one bar while a Martini ordered from Station 2 may go to another bar. Yet both Martinis would use the same Bar printer channel.

Printer channels isolate which items you want to apply to a specific print job. Referring to the previous example, if I added a printer exclusively for printing dessert orders, then I would need a new printer channel to isolate those dessert items. Or if I had one kitchen printer for hot items and one for cold items, I would need two printer channels to isolate my hot items from my cold items. You assign products to print channels within Report Category Setup.

Determining Printer Channels

You determine the establishment's printing needs. In this example, they are as follows:

- *All slips and receipts print at the station.*
- *All food prints to the kitchen.*
- *All beverages print to the bar.*

From this you formulate the printer channels. The first statement (receipts) refers to printing locally at the station. This encompasses all transaction-oriented printing such as charge slips, cash out reports and receipts. It is important to note that all POS systems will require this local station printing, so your first printer channel should always be **LOCAL**.

The next statement addresses the printing of food orders. They will be done in the kitchen, so your next printer channel is **KITCHEN**.

The last statement addresses the printing of beverage orders. All alcoholic and non-alcoholic beverages will print to the bar, so your final printer channel is **BAR**.

You can program up to nine printer channels (each channel representing one of the nine possible ports you can configure on a station). In most cases you will only require 3-5 channels. You do not have to use them all.

- **Question 1**: If the establishment had two kitchens, each with a printer, would you need a channel for each kitchen? The answer is No. Remember that a printer channel is like a specialized lane of traffic. Regardless of the destination (or number of destinations), you only need the one channel (or lane) to handle the common print traffic, being kitchen orders.

- **Question 2**: If the establishment added a printer specifically for pizza orders, would you need a channel for this? The answer is Yes. Pizza items must now take a different path for the regular kitchen items in order to get to the printer destination specified for pizza items.

- **Question 3**: If a pizza printer was also added to the second kitchen, would you need a channel for this? The answer is No. All pizza items would only require the one channel, regardless of how many destinations they may go to.

- **Question 4**: If the establishment also wanted desserts to print at the pizza printer, would you need a channel for this? The answer is No. The criteria for the channel has simply been expanded to include dessert items. For the sake of efficiency however, it would be a good idea to rename the pizza channel to Pizza & Dessert.

Print Consolidation

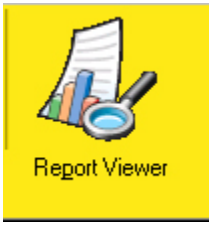
A consolidation print is a summary print. It isolates specific items and tells the reader the quantity of that item that exists on the order. For example, a large order prints in the kitchen. It contains appetizers, entrees and desserts. Time is crucial and the chef needs to know what needs to be put on the grill right away. The consolidation print shows up at the bottom of the kitchen print identifying all grill items and the quantities ordered. It does not need to provide information such as desired cooking duration or sauces. That information is provided in the regular order printout. The purpose of the consolidation print is strictly to expedite the preparation of critical items.

Print consolidation is applied to specific printers through Administrator / Setup Network Printers / General Tab and applied to specific items through Products / Product Setup / Product Setup Tab.

Reports

Report Viewer

One of the custom icons you can apply to the Back Office screen is Report Viewer.



Report Viewer allows you to generate sales and operational reports. The reports screen is divided into two basic windows. The window on the left displays folders pertaining to the various applications you can run reports for. As you select one of these folders, the window on the right will display the reports contained within that folder.

Close

This will exit you from Report Viewer.

Change Printer

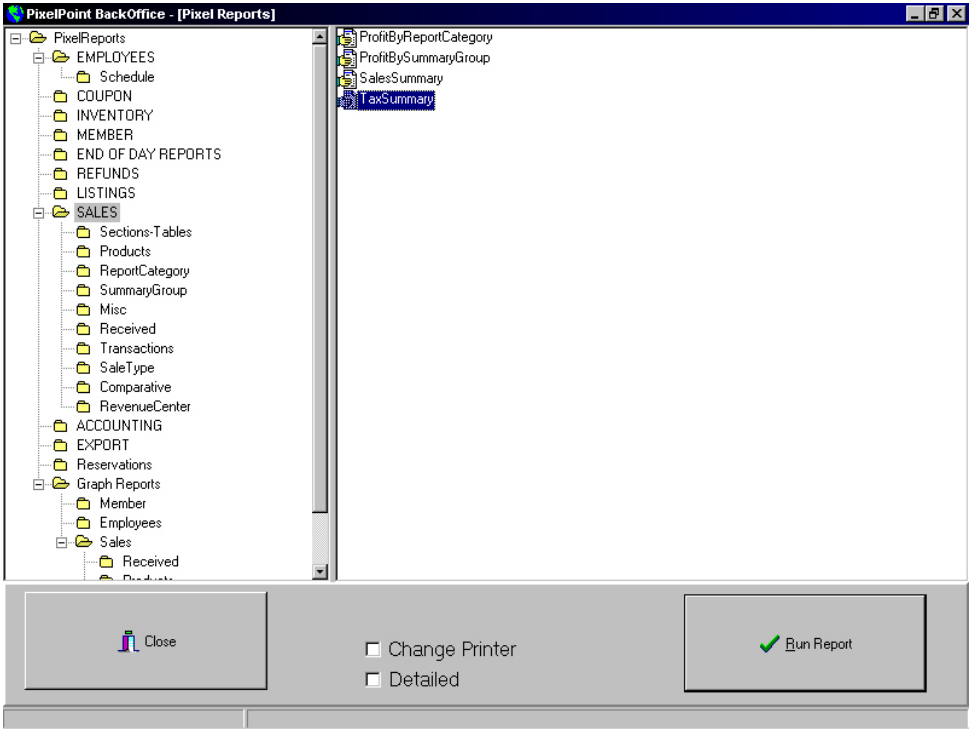
Checking this will allow you to choose which network printer you wish to print to.

Detailed

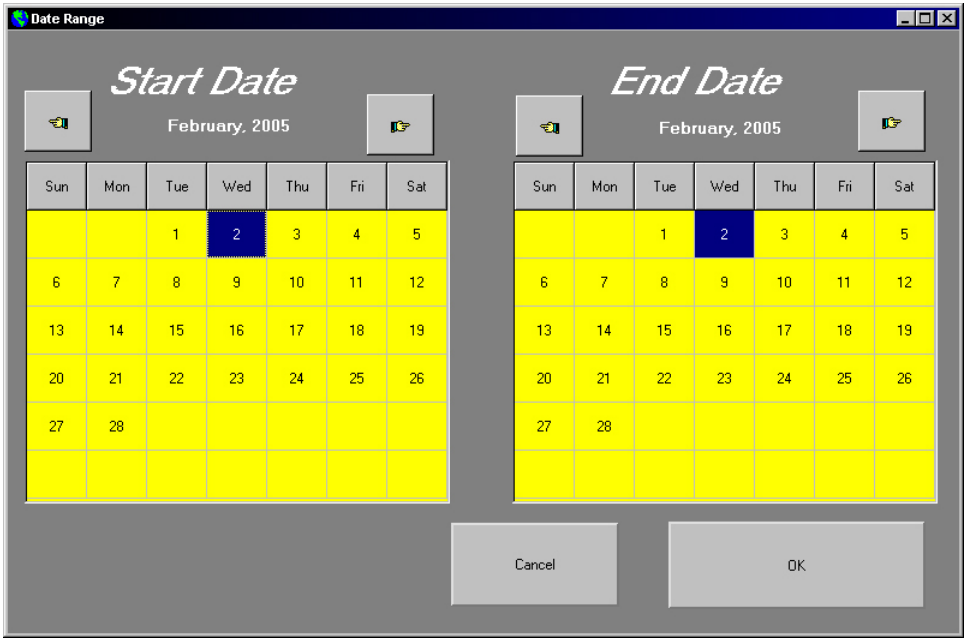
This will generate the selected report in a detailed mode, offering more information than would normally be included if this box were unchecked.

Run Report

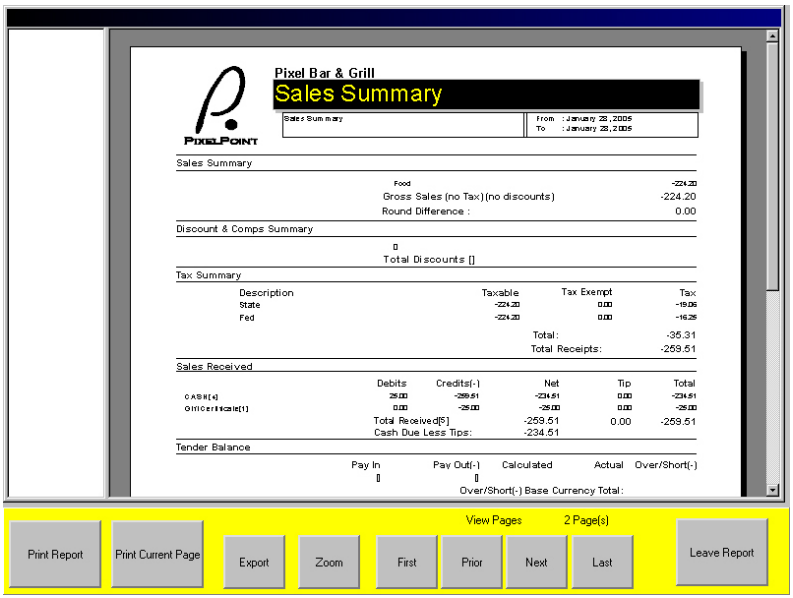
This will execute the report.



To run a report, click the title of the report once then select [Run Report] or simply double-click its title. Depending on the report, you may be presented with this screen (see below) asking for a date range. Select the desired beginning and end date, the select the [OK] button.



The system may take a moment to generate the report then you will be presented with a screen display of the report. Below the report, are several buttons.



Print Report

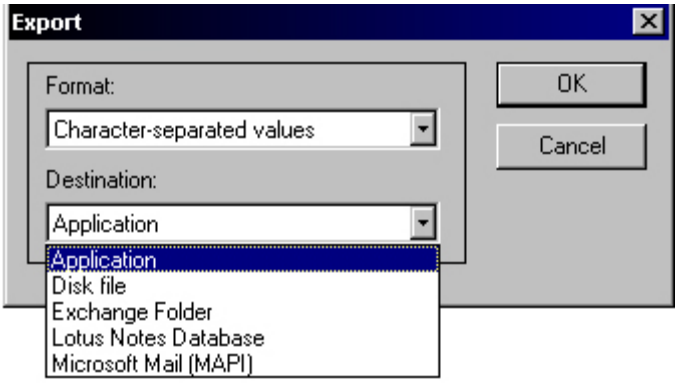
This will send the current report to a printer.

Print Current Page

This will send the currently displayed report page to a printer.

Export

This will export the report. A window will display allowing you to define the format of the information (such as a text file, spreadsheet or other format) and the destination (being the type of file such as an email or database file).



Zoom

This will allow you to zoom in and out of the currently displayed report.

First / Last

In a multi-page report, First will take you to the first page, last will take you to the last page.

Prior / Next

In a multi-page report, Prior will take you back one page, next will advance you to the next page.

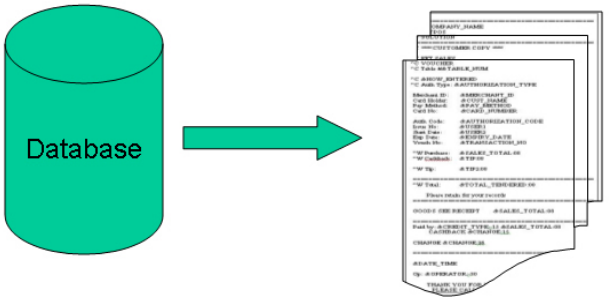
Leave Report

This will close the report and return you to the reports screen.

DataMiner

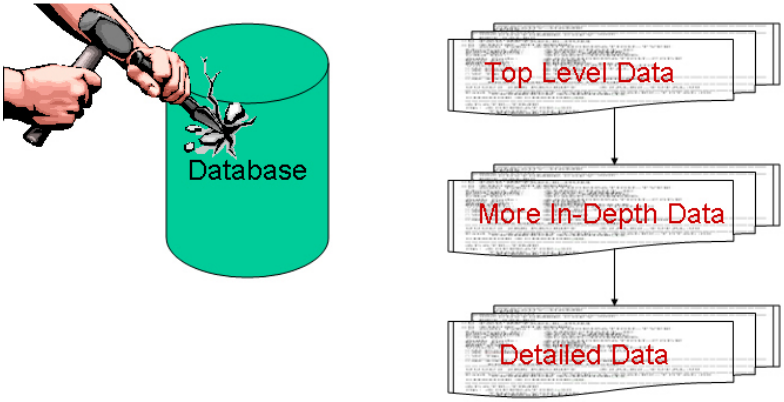
What is Data Mining?

When you run a conventional report, it pulls the information from the database and presents it in a set format. While the numbers within the report may vary, the type of information presented is set and (for the most part) inflexible.



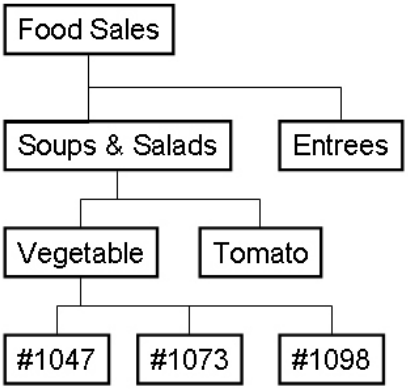
The downside of conventional reporting however, is that if the user requires more information or needs to see it presented differently, the template use to create the report has to be modified in order to achieve this.

Data mining is a new approach that offers flexible, three-dimensional reporting. The reports have depth allowing you to dig down into your information to discover what brought about any of the numbers presented. In essence, data mining begins where conventional reporting ends.



A typical example of a data mining report would be one showing product sales. The report would begin by showing totals for all Food and Beverage sales. From here, you may wish to find out what made up the total for Food Sales. Clicking on that field, you see that number

broken down into its related report categories, in this example being Soups & Salads and Entrees.



At this point, you wish to see what items comprised the sales number for Soups & Salads. Clicking on that field, you see the totals for each soup that was sold. Clicking on one of the soups, you see which transactions contained that specific type of soup.

Data mining is literally that: You drill down into the report's data, mining for the desired information.

Employees

Employee Concepts

There are two pre-requisites which must be set up prior to applying employees to the POS. These are Job Position and Department.

Job Position

The employee will be assigned to a job position. In doing this, the employee record will inherit all programming associated with that job position such as their security level and tip declaration settings. This will also allow the person scheduling work shifts to group people making it easier to focus on specific job positions (such as scheduling a shift specifically for bartenders).

Department

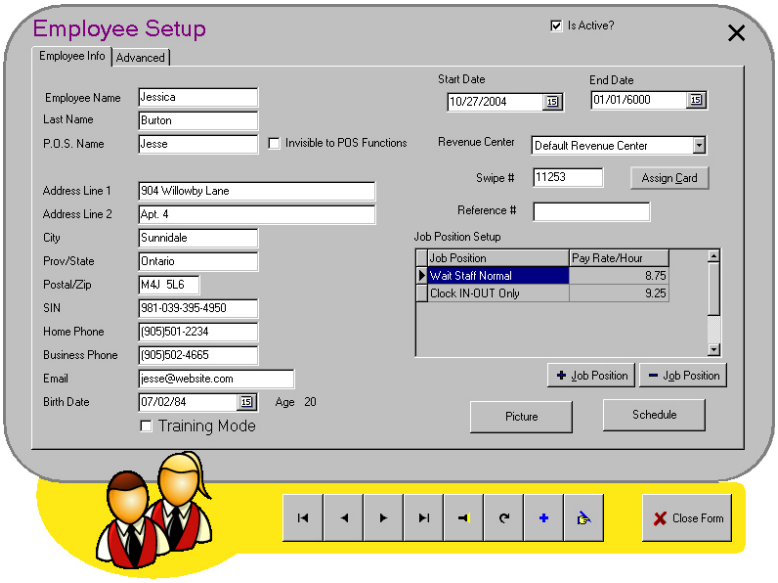
Job positions are grouped into Departments. This allows management to group job positions for easier reporting.

Instructions for setting up job positions and departments are found in the BackOffice Administrator section of this manual.

Setup Employees

Employees / Setup Employees

This is where you apply all employees who will have access to the system. Most of the fields are self-explanatory. Any fields that may require some explanation are described below.



P.O.S. Name

This is the name that will show up on the customer receipt. It is recommended that you only provide the server's first name or commonly used nickname.

Invisible to POS Functions

This will prevent the employee record from showing up on employee-related functions such as schedules. This box would be used if the employee record were someone like the POS technician who would require access but not actually work there.

SIN

Social Insurance Number. Also referred to as Social Security Number.

Training Mode

Training mode allows the employee to open checks, place orders and apply functions. However, it prohibits any remote and local printing. It also does not retain any of the transaction information and does not affect sales numbers in any way.

Swipe

The employee swipe card number. You can assign either a manual or swipe card by selecting the [Assign Card] button. You cannot view the contents of the swipe # field if the employee's security level is higher than your own.

Reference

This field is for reporting purposes only. For example, it could be used to apply a payroll reference number.

Job Position Setup

This is where you designate what job position the employee will have. Selecting this will determine their level of security on the system. You can also assign a pay rate with the job position. This will be reflected within time and attendance reports. You can assign multiple job positions to the employee record. For example, today the person is a server, tomorrow they may be a bartender. The rate of pay can vary with each job position too.

You can change the job position either by clicking on the job position title or by using the [+/- Job Position] buttons. You cannot assign a job position higher than your own.

Picture

You can apply a jpeg image of the employee swipe card.

- Select Source - If multiple source are available (such as a scanner, a digital camera, etc.) you select the image source within here.
- Acquire Image - This pulls the image from the source.
- Print VIP Card - If a card printer is attached to the system, this will apply pertinent employee information and picture to the card.
- Load Image - Allows you to load a pre-saved jpeg image on the hard drive.

Schedule

This allows you to define the work preferences of the employee. There are three preferences you can schedule:

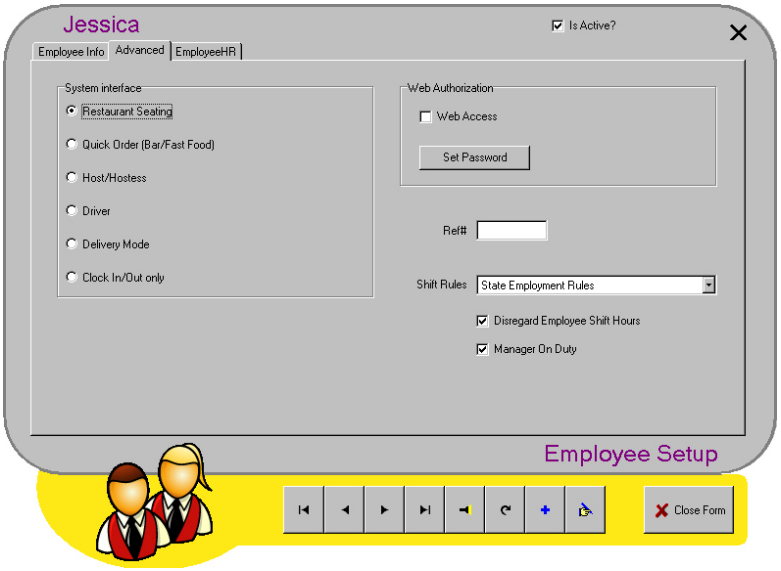
- Not Wanted - Can work it but would prefer not to.
- Wanted - Can work and wants to work.
- Cannot Work - Is unable to work.

The Hours Preferred field allows you to indicate how many hours per week the employee prefers to work. There is also a Skill Level field that allows you to indicate their general skill level.

The schedule information is transferred across to the Employee Scheduling function (StaffTime™).

Advanced Tab

The Advanced tab contains information regarding their operational interface and shift-related settings.



System Interface

This determines the operational interface that the employee will be applied to upon logging in. This setting can be set or reset from the front-end through the Your Settings screen.

- Restaurant Seating - You are presented with the table layout and must select a table in order to open a check.
- Quick Order - You are presented with either a blank check or the Transaction View screen. Table selection is not required to open a check.
- Host/Hostess - You are presented with the Table Management screen for taking reservations and seating people.
- Driver - You are presented with the Delivery Driver screen for taking orders for delivery.
- Delivery Mode - You are presented with the Delivery Order Taker's screen for taking delivery and pickup orders.
- Clock In/Out Only - You are only able to use PixelPoint's time & attendance functions.

Web Authorization

This allows the employee to access their work schedule through the Internet. This works in conjunction with PixelPoint's WebTime™ product.

Ref#

This is a reference number for reporting purposes. For example, you might enter a payroll reference number.

Shift Rules

You can override Shift Rules settings and apply a specific set of rules for this employee.

Disregard Employee Shift Hours

This is used for Till Employees in which this setting will set the employee's hours to zero on clock-out. This prevents confusion when reviewing employee time & attendance reports by eliminating all time calculations for the tills.

A till employee is a drawer insert that is assigned to a station (just like an employee). At the end of a shift, the till is cashed out and reconciled. All staff who used that till share responsibility for the balance of its contents.

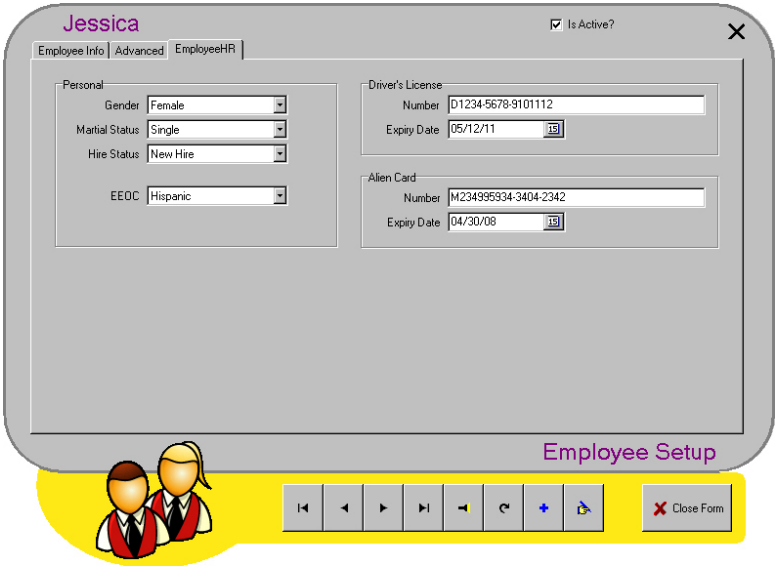
When set, this function will bypass regular schedule enforcement so you will not have to schedule Tills.

Manager On Duty

This indicates that this employee, when logged in, is assumed to be the manager on duty. As a result, this person will receive all Shift Rules alerts as well as other related alerts such as printer errors.

HR Tab

The Human Resources tab allows you to apply employment-related information that may be pertinent for governmental reporting and accountability.



Personal

- **Gender** - Select the gender of the individual (male / female).
- **Marital Status** - Select their marital status (married / single).
- **Hire Status** - Select their hire status (new hire, re-hire, transfer, borrow, leave)
- **EEOC** - Select their ethnicity (caucasian, hispanic, asian, native, other)

Driver's License

These two fields require driver's license information. It is critical information for staff designated as delivery drivers.

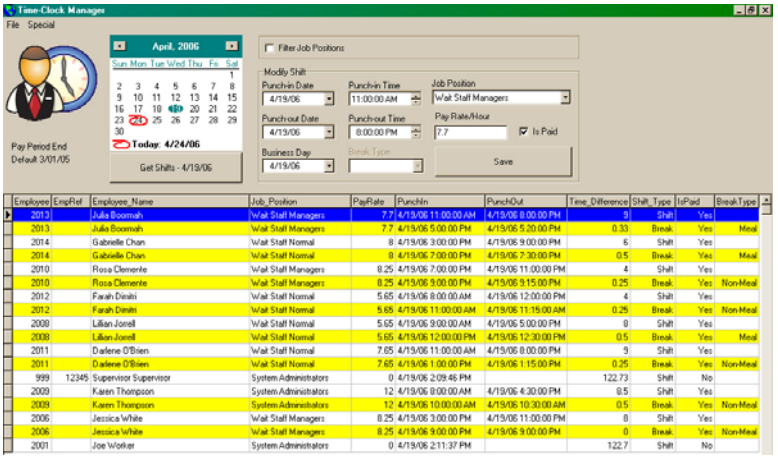
Alien Card

These two fields require the employee's work visa information in the event they are from a foreign country.

Time-Clock Manager

Employees / Time-Clock Manager

This function is used to make changes to an employee's time clock. It is used in situations where you need to modify their clock-in or clock-out times, alter their rate of pay or change the job position for a given shift.



Calendar Area

Select the day for the schedule you wish to review. Use the arrow buttons to change the month.

Get Shifts

Upon selecting the desired date, select this to retrieve the shift records (as shown in the lower portion of the screen).

Filter Job Positions

Select this to isolate a specific job position in the shift display.

Modify Shift Area

As you select one of the shift records in the lower portion of the screen, the punch-in/out information in this area will change to reflect the hours of that employee on that day. At this point, you can change the employee's clock-in and out times. You can also change the business (posting date) they worked, rate of pay for the shift and job position they worked. You can also use this for applying breaks and designating whether this is a paying shift or not. Select [Save] to apply the changes.

Shift Display Area

You select the day in the Calendar area and click on [Get Shifts]. This area then displays the shift information for each employee who worked that day. From here, select the desired employee record to affect changes in the Modify Shift area.

File Pull Down Menu

Located at the very top of the screen, the contents of this pull down menu will allow you to exit from this function.

Special Pull Down Menu

- **Add Shift -** This will allow you to create shifts from scratch. For example, several people may have worked when the establishment is closed and the POS time and attendance was not used. You can go in after-the-fact and create the shift and apply work and break times. As shifts are added, they will be stored sequentially based on the date of the shift.
- **Delete Shift** - Use this to remove an existing shift from the system.
- **Delete Break** - Use this to remove someone's break from the shift.
- **View Change Log** - Use this to view the log of changes that were applied to the shift.

Employee Scheduler

Scheduler Features

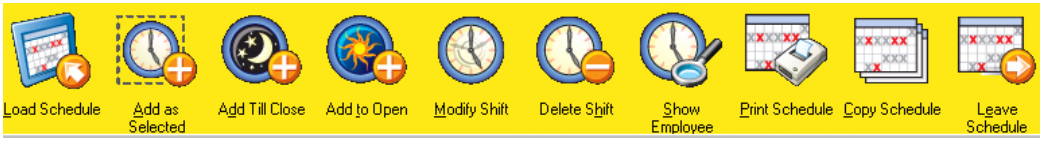
Employees / Schedule

The employee scheduler program (StaffTime™) is a management tool designed for coordinating employee work schedules and time off. Upon selecting [Schedule], the screen will display a calendar with the current day highlighted and circled. It will prompt you to select a schedule.

By default, a schedule represents 1 week. Select the day you wish to look at. It will load the entire schedule for that week and take you directly to the schedule settings for that specific day.

Task Bar

Listed across the top of the screen is a yellow task bar containing quick access icons to all of the major functions of the employee scheduler system.



Load Schedule

Allows you to load another schedule. It presents a calendar from which you select a day. Upon selecting the day, the schedule for that week will load and the time cells displayed will be the day you selected.

Add As Selected

Click and drag across the time cells you wish to apply to a shift. Then selecting this icon will apply the current shift type to these cells.

Add Till Close

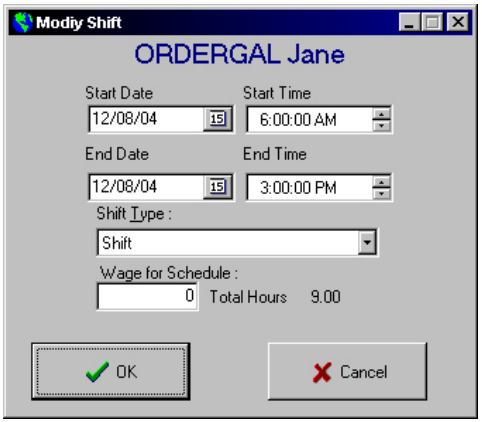
With the hours of operation configured within Schedule Setup, select the first cell for the employee's shift and select this. The shift will be applied from that time cell through to closing hour of the establishment.

Add To Open

With the hours of operation configured within Schedule Setup, select the last cell for the employee's shift and select this. The shift will be applied from that time cell back to opening time of the establishment.

Modify Shift

Click on the shift, then click on this icon. The Modify Shift window will display allowing you to make changes (see below). You can also access this by right-clicking on a shift and selecting [Modify Shift].

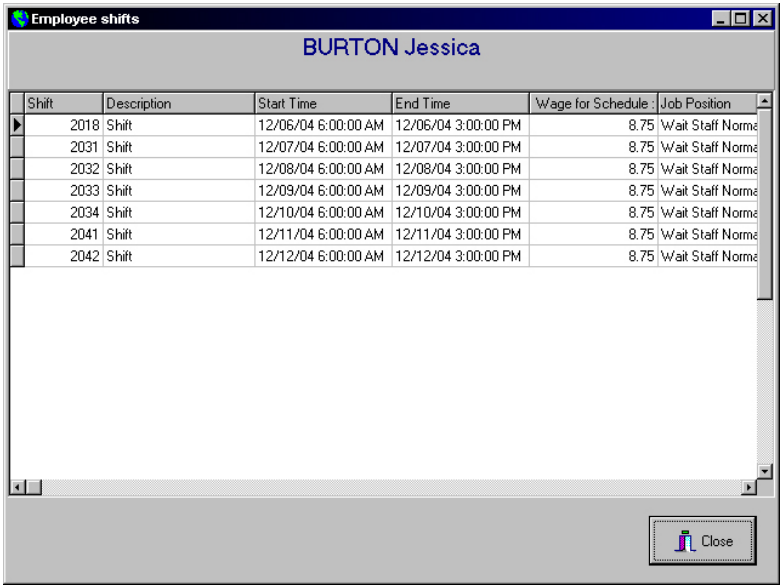


Delete Shift

Click on the shift, then click on this icon. It will allow you to remove the shift from the schedule.

Show Employee

Click on a shift or employee name, then click on this icon. It will display the employee's scheduled times for the entire shift (see below). This can also be accessed by double-clicking on the employee's name.


Employee shifts
BURTON Jessica
Shift
Description
Start Time
End Time
Wage for Schedule :
Job Position
2018 Shift 12/06/04 6:00:00 AM 12/06/04 3:00:00 PM 8.75 Wait Staff Norma
2031 Shift 12/07/04 6:00:00 AM 12/07/04 3:00:00 PM 8.75 Wait Staff Norma
2032 Shift 12/08/04 6:00:00 AM 12/08/04 3:00:00 PM 8.75 Wait Staff Norma
2033 Shift 12/09/04 6:00:00 AM 12/09/04 3:00:00 PM 8.75 Wait Staff Norma
2034 Shift 12/10/04 6:00:00 AM 12/10/04 3:00:00 PM 8.75 Wait Staff Norma
2041 Shift 12/11/04 6:00:00 AM 12/11/04 3:00:00 PM 8.75 Wait Staff Norma
2042 Shift 12/12/04 6:00:00 AM 12/12/04 3:00:00 PM 8.75 Wait Staff Norma
Close

Print Schedule

This will print an 8.5x11 copy of everyone's shifts for that schedule. This report will include non-working schedules (such as holidays and time off).

Copy Schedule

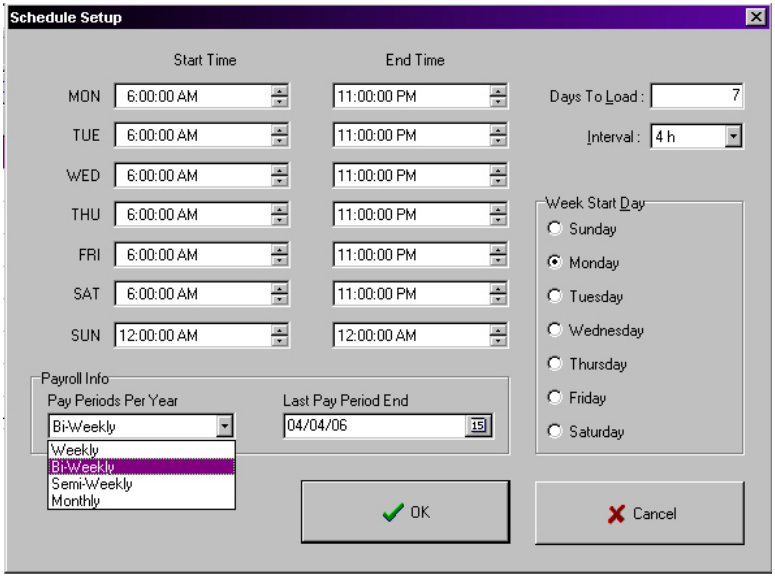
Click on an employee's row, then click on this icon. It will copy the previous schedule's shifts for this person into the current schedule.

Leave Schedule

Exits from the Scheduler, returning you to PixelPoint BackOffice.

Setup

The Setup screen allows you to define the hours of operation for the establishment. It also allows you to set the number of days to be included in a Schedule, set the default time interval and designate which day is to be the first day of the schedule. To access Setup, select the Schedule pull down menu at the top of the screen, then select [Setup].



Start Time

Use the up/down arrows on each field to designate the open time for each day.

End Time

Use the up/down arrows on each field to designate the close time for each day.

Pay Periods Per Year

Use this field to identify the duration of pay periods.

Last Pay Period End

Use this to anchor the pay periods to a specific calendar date. These pay period fields are used to prevent editing of shifts in previous periods.

Days To Load

Enter the number of days that the shift will entail. By default, a shift represents 7 days (1 week). You can reduce the number of days to exclude weekends or extend it to a period grater than one week.

Interval

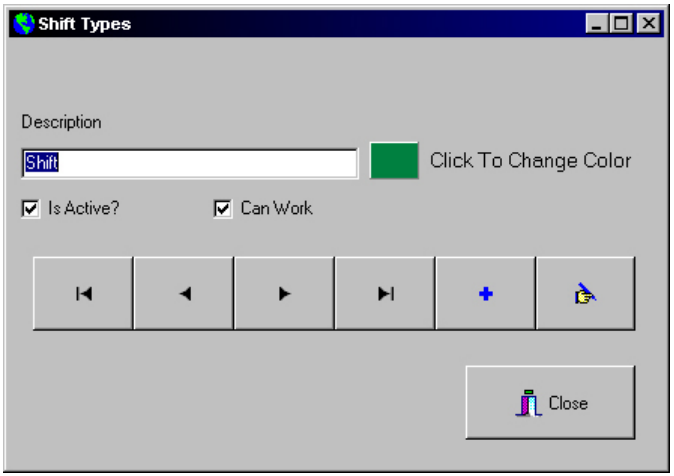
Defines the default time cells displayed. Settings vary from 15 minute - 4 hour intervals.

Week Start Day

Designates the first day of the schedule. If excluding weekends, set the Days To Load to 5 and set this day to Monday.

Setup Shift Types

You can modify existing shift types (Shift, Vacation, Time Off) and create new ones. To access Shift Types, select the Schedule pull down menu at the top of the screen, then select [Setup Shift Types].



Description

Enter the name of the type of shift. Located to the right of this field is a color tile showing the color of this kind of shift. You can change this by clicking on the color tile.

Is Active

Indicates whether the shift type is an active option or not.

Can Work

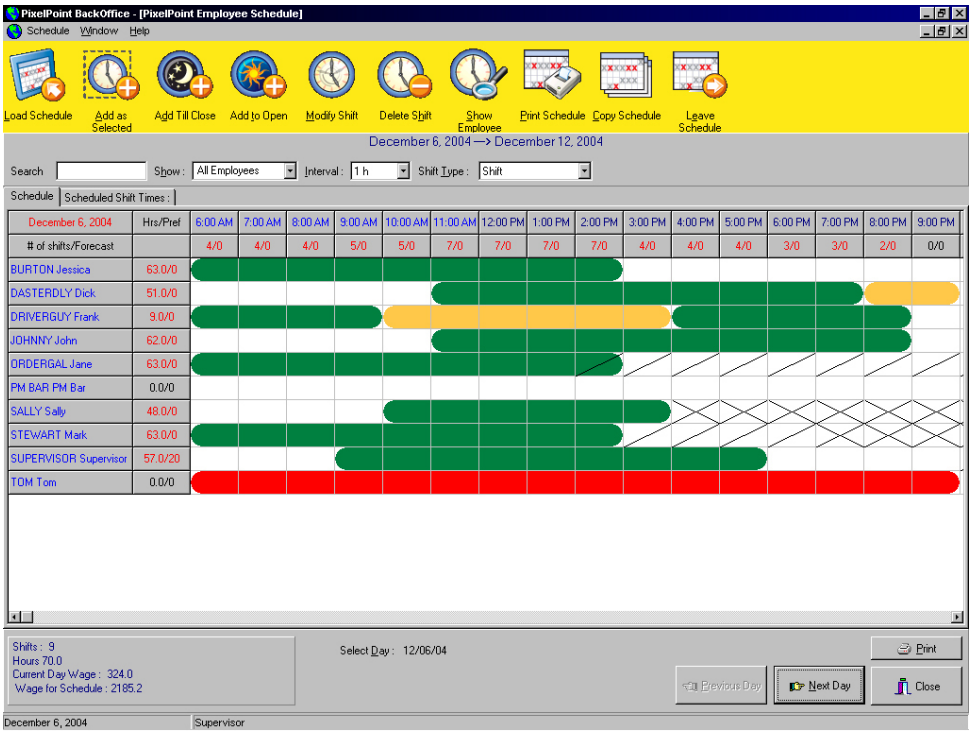
Indicates whether it is a work shift or non-work shift. Work shifts print in black on the printout. Non-work shifts print in gray. This also determines whether to apply staff and wages to row and column summaries.

Schedule Tab

Employees / Schedule / Schedule Tab

The Schedule tab displays by default. It contains rows that represent employees, and columns that represent intervals of time. The rows and columns intersect to form cells. These can be filled with different colored bars to indicate the type of shift activity the employee is scheduled for during that time.

This application interacts with the schedule function within Employee Setup, reflecting the employee's preferences regarding the number of desired hours and which ones they prefer not to work or cannot work. This shows up (see image below) as diagonal lines where they prefer not to work and an 'x' where they have stated they cannot work.



Search

Type in the last name of the employee to filter the list of employees.

Show

Offers a drop down menu which allows you to filter the list of employees by job position.

Interval

Allows you to change the time intervals. The settings can range from 15 minutes to 4 hours.

Shift Type

Offers a drop down menu which allows you to change the type of shift.

Summary Area

Located in the bottom left corner of the screen, this displays the total number of employees, hours, wages and wages for the overall schedule. These numbers reflect the contents shown in the rows and columns above.

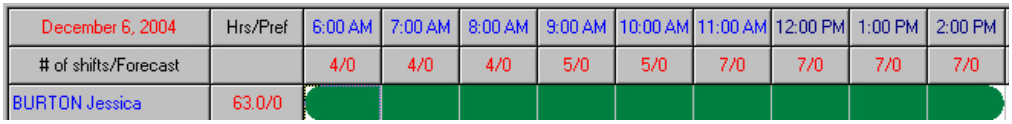
Previous Day / Next Day

Allows you to move from one day to the next. You can go back as far as the first day of the shift and forward as far as the last day of the shift. To select a day outside of that range, you must load another shift.

Print

Print the schedule.

Cell Definitions



December 6, 2004	Hrs/Pref	6:00 AM	7:00 AM	8:00 AM	9:00 AM	10:00 AM	11:00 AM	12:00 PM	1:00 PM	2:00 PM
# of shifts/Forecast		4/0	4/0	4/0	5/0	5/0	7/0	7/0	7/0	7/0
BURTON Jessica	63.0/0									

Hrs/Pref

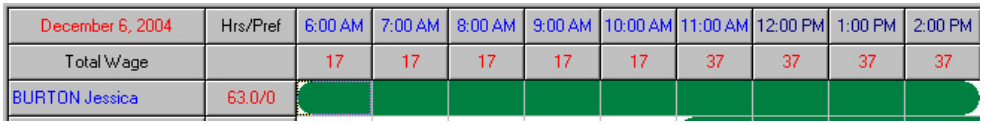
This column contains two numbers. The first number indicates the total number of hours the employee has been allocated within this schedule. The second number represents the number of hours they prefer to work within a given shift. For example, if the number shows 12/15, this means the employee has 12 hours scheduled and they prefer to work 15 hours per schedule. The preferred number is pulled from their personal schedule within Employee Setup.

Of Shifts/Forcast

This row contains two numbers. The first number indicates the number of employees designated for the time interval. The second number represents the average of the last three schedules. For example, if you are scheduling Bartenders and the number shows 2/3, this means that you currently have two Bartenders assigned to that time slot where (on average) you designate three Bartenders.

Total Wage

If you double-click on [# Of Shifts/Forcast], the title will change to Total Wage and the contents of that row will change as well. This shows the total amount of wages it will cost within each time slot. As you assign more employees to work, the amount of the wage field goes up. This is with the assumption that each employee's job position has been assigned a wage within Employee Setup.



December 6, 2004	Hrs/Pref	6:00 AM	7:00 AM	8:00 AM	9:00 AM	10:00 AM	11:00 AM	12:00 PM	1:00 PM	2:00 PM
Total Wage		17	17	17	17	17	37	37	37	37
BURTON Jessica	63.0/0									

Adding A Shift

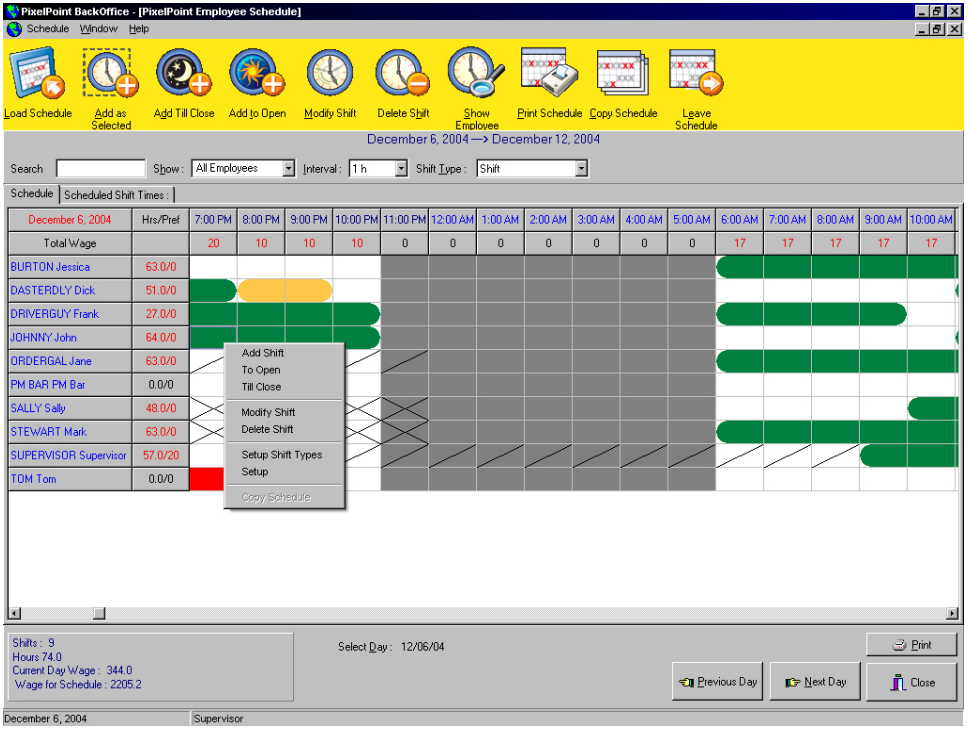
There are several ways you can apply a shift to the Schedule Tab.

1. Click and drag across the cells you wish to apply to a schedule.
2. Click the [Add As Selected] icon.

1. Click and drag across the cells you wish to apply to a schedule.
2. Right-click and select [Add Shift]
    - The word 'Shift' may change based on the current shift type.

1. Click the first or last cell you wish to apply to a schedule.
2. Right-click and select [To Open] or [Till Close]
    - Hours of operation must be pre-defined in Setup for this function to work.

Note: You can schedule shifts to any cell regardless of its status (closed, not wanted or cannot work).



Modify Shift

Will present the window version of the schedule and allow you to change the start time, end time, shift type and pay rate.

Delete Shift

Will remove the shift from the schedule.

Setup Shift Types

Will present the Setup Shift Types screen.

Setup

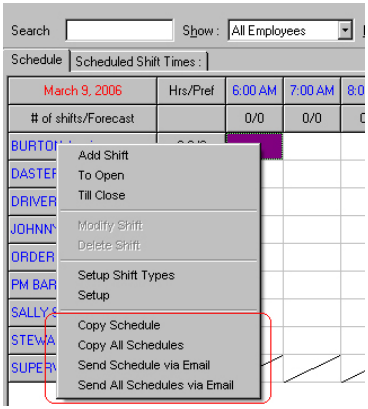
Will present the Schedule Setup screen.

Copy Schedule

If right-clicked on an employee with no schedule, this will copy the employee's previous schedule.

Copy All Schedules

Copy the schedules of all employees shown within the current view or all employees globally, from the previous schedule to the current schedule.



Email Schedules

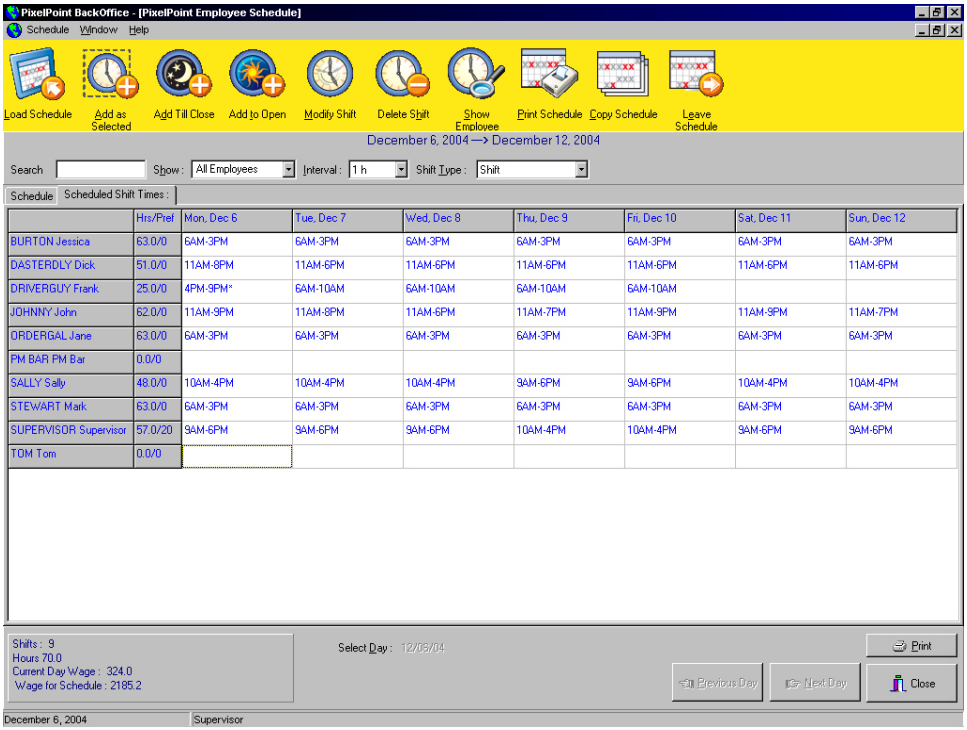
This information can also be emailed to employees using either the ‘Send Schedule via Email’ for select individuals or ‘Send All Schedules via Email’ for all staff.

Though the email addresses are contained within the employee record, setup of the email function within PixelPoint is located under Administrator in Setup System. Refer to the Setup System section for email configuration details.

Scheduled Shift Times Tab

Employees / Schedule / Shift Times Tab

The Shift Times tab contains cells that display the start/end time for the employee's shift. Double-clicking on the cell will display the shift window showing the start time, end time, shift type and wage.


PixelPoint BackOffice - [PixelPoint Employee Schedule]
Schedule Window Help
Load Schedule
Add as Selected
Add Till Close
Add to Open
Modify Shift
Delete Shift
Show Employee
Print Schedule
Copy Schedule
Leave Schedule
December 6, 2004 —> December 12, 2004
Search
Show : All Employees
Interval : 1 h
Shift Type : Shift
Schedule
Scheduled Shift Times :
Hrs/Pref
Mon, Dec 6
Tue, Dec 7
Wed, Dec 8
Thu, Dec 9
Fri, Dec 10
Sat, Dec 11
Sun, Dec 12
BURTON Jessica 63.0/0 6AM-3PM 6AM-3PM 6AM-3PM 6AM-3PM 6AM-3PM 6AM-3PM 6AM-3PM
DASTERDLY Dick 51.0/0 11AM-8PM 11AM-6PM 11AM-6PM 11AM-6PM 11AM-6PM 11AM-6PM 11AM-6PM
DRIVERGUY Frank 25.0/0 4PM-9PM* 6AM-10AM 6AM-10AM 6AM-10AM 6AM-10AM
JOHNNY John 62.0/0 11AM-9PM 11AM-8PM 11AM-6PM 11AM-7PM 11AM-9PM 11AM-9PM 11AM-7PM
ORDERGAL Jane 63.0/0 6AM-3PM 6AM-3PM 6AM-3PM 6AM-3PM 6AM-3PM 6AM-3PM 6AM-3PM
PM BAR PM Bar 0.0/0
SALLY Sally 48.0/0 10AM-4PM 10AM-4PM 10AM-4PM 9AM-6PM 9AM-6PM 10AM-4PM 10AM-4PM
STEWART Mark 63.0/0 6AM-3PM 6AM-3PM 6AM-3PM 6AM-3PM 6AM-3PM 6AM-3PM 6AM-3PM
SUPERVISOR Supervisor 57.0/20 9AM-6PM 9AM-6PM 9AM-6PM 10AM-4PM 10AM-4PM 9AM-6PM 9AM-6PM
TOM Tom 0.0/0
Shifts : 9
Hours 70.0
Current Day Wage : 324.0
Wage for Schedule : 2185.2
Select Day : 12/06/04
Print
Previous Day
Next Day
Close
December 6, 2004
Supervisor

This screen is particularly effective in showing a quick summary of all shifts applied to the schedule. In the event an employee has been set with a split schedule (more than 1 shift within the day), the first shift time will display with an asterisk next to it.

Adding/Modifying A Shift

1. Double-click on the cell. The shift window will display.
2. Edit the start and end time.

Menus & Products

Product Setup

Product Concepts

Product

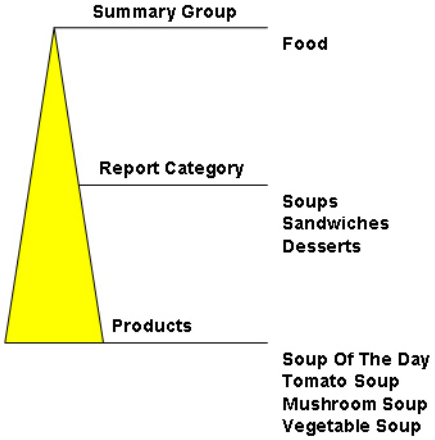
A product is anything that can be ordered at the front-end. It usually refers to food and beverage items (sometimes referred to as menu items), but can also encompass other functions such as retail items, rentals, bussing commands, kitchen commands and so on. It is for this reason that they are more extensively referred to as 'products'.

Report Category

For the sake of reporting purposes, similar products are grouped together into Report Categories. For example, the establishment offers several types of soups. These products can be grouped together into a Soup report category. When it comes time to generate a report category report, you will be able to see how well soups (in general) are selling.

Summary Group

As a further extension of reporting, similar report categories are grouped into Summary Groups. For example, all report categories referring to food items are grouped into a Food summary group. When it comes time to generate a summary group report, you will be able to compare food sales to other summary groups such as beverages and retail items.

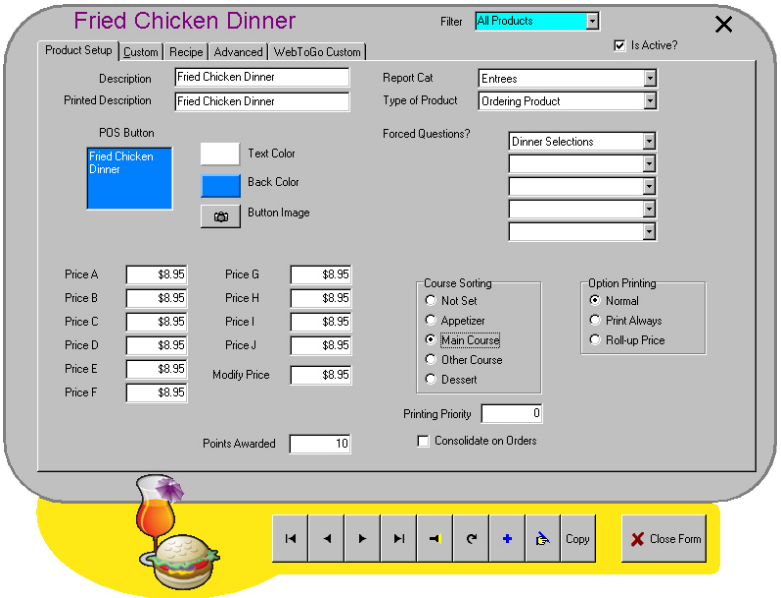


Similar products have similar characteristics, such as where they may print, what taxes should be applied and what modifier pages may be required. Rather than program these settings for each product, you can apply them at the report category level. In doing this, all products that are assigned to that report category can inherit the common programming.

Product Setup

Products / Product Setup

Product Setup allows you to program everything pertaining to the product. Within this section you will discover all of the different types of products that can be created and what each type can be used for.



Description

This is the description that prints on the customer receipt. It is important that short forms be avoided here if possible. Due to the size of print on a receipt, this field permits up to 30 characters.

Printed Description

This is the description that prints on the remote printers. This is where shorter forms could be applied. For example, referring to the example image, you could shorten it down to FR CHKN DNR. The only people seeing this description would be the kitchen staff so it is important that this description be suitable for them. Due to the size of print on a remote print, this field permits up to 20 characters.

POS Button

This is the title that prints on the touch screen button. This description is intended for the server placing the order. You can fit two lines of text on the button. It is recommended that you leave this text left-justified to ensure proper spacing regardless of the applied font.

Text Color

This presents a color chart with which you can select the color of text that will display on the POS Button. You can choose from among 48 basic color tiles, or apply custom colors.

Back Color

This presents a color chart with which you can select the color of the POS Button. You can choose from among 48 basic color tiles, or apply custom colors. Do this by selecting [Define Custom Colors], pick a custom color box to modify, then select the desired color from the rainbow tablet and select [Add To Custom Colors].

Button Image

This allows you to apply a graphic image to the POS Button. The image will occupy the entire button display. If you wish to have both an image and text on the button, the text must be contained within the image. It is recommended that you use small images of around 100-150 pixels. Square images appear best though the system will stretch the image to fit.

Price A-J

Enter the price of the item in Price A and press the Tab key. It will apply the same price to all remaining price fields. You can set different prices for any of them. There are 10 price levels with which you can adjust pricing based on a wide variety of circumstances. You can configure the system to apply these different price levels using the following criteria:

- Report Category - All items in a report category switch price levels based on the schedule in Report Category Setup. For example, Wednesday night from 8:00-9:00 is 'Happy Hour'. All liquor report categories are set to shift to Price B at this time. You can also apply this same function to an individual product by using the schedule in Product Setup.

- Member Group - Members are assigned to groups. A group can be set to refer to prices designated on different price levels. For example, Seniors use Price B, Students use Price C.

- Station - Each station can be set to refer to a different price level. For example, a sandwich ordered on Station 1 is Price A. The same sandwich ordered on Station 2 is Price B.

- Sales Type - Each sale type can apply to a different price level. For example, Dine-In uses Price A, Delivery uses Price B.

Modify Price

This is a special price level that applies when an Ordering Product is being used as an Option. For example, a Salad is $4. However, if you order the Steak Dinner, you can add that Salad for $1. The modify price is applied through the use of a forced question.

Typically, a forced question would offer you a choice of modifiers. But if you include an Ordering Product as one of the options, its Modify Price will be applied.

Points Awarded

Points redemption is one of the methods of client retention offered through PixelPoint. When a member is applied to a check, the member will be credited points for each item on the check. The points for each item are applied here. For example, the Soup Of The Day is worth 10 points. The 10 points are applied to this field.

Report Cat

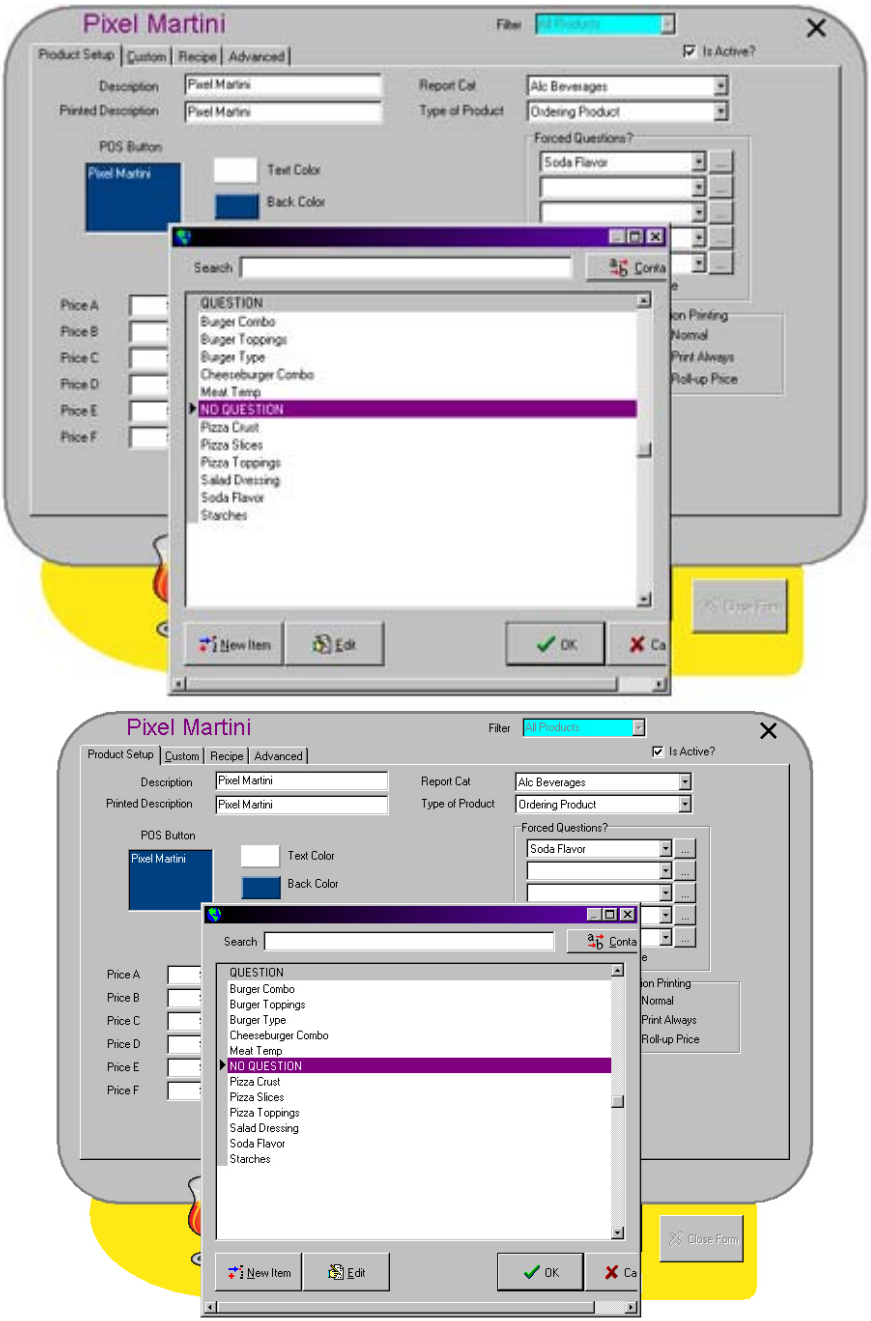
Select the report category this product belongs to. The product will adopt all programming that was applied to that report category (modifier pages, taxes, print location and price schedule).

Type Of Product

Select the type of product. This will determine how it will act on the system. Refer to the Product Types section for details on each selection.

Forced Questions

Select from the list of forced questions. You can apply up to 5 forced questions per product. Every product within each forced question can also have 5 forced questions as well. For example, ordering a dinner presents a forced question of 'Soup or Salad'. You choose the salad. That salad product may then have a forced question as to the type of salad. From that you choose the Chef Salad. That product then has its own forced question as to the choice of dressing. All of this stems from just the one forced question within the dinner product. There are still 4 more forced questions available for that dinner. In other words you can have forced questions within forced questions.


Pixel Martini
Filter
Is Active?
Product Setup
Custom
Recipe
Advanced
Description
Pixel Martini
Printed Description
Pixel Martini
Report Cat
Alc Beverages
Type of Product
Ordering Product
POS Button
Pixel Martini
Text Color
Back Color
Forced Questions?
Soda Flavor
Price A
Price B
Price C
Price D
Price E
Price F
Search
QUESTION
Burger Combo
Burger Toppings
Burger Type
Cheeseburger Combo
Meat Temp
NO QUESTION
Pizza Crust
Pizza Slices
Pizza Toppings
Salad Dressing
Soda Flavor
Starches
New Item
Edit
OK
Normal
Print Always
Roll-up Price
Close Form

From the product setup screen, you can also search, add and edit forced questions. Located next to the forced question selection lines is a search button [...] which will allow you to do all of this without leaving Product Setup.

Course Sorting

Select the course that applies to this item. This item will be grouped into that course. Refer to the Sort Order Tab in Setup Network Printers for further details.

Option Printing

This applies if the product type is Option. Normally, an option will not print if it has no price. If a price is applied, the item will print on its own line with its price.

- Print Always forces the option to print on the receipt regardless of whether it is priced or not.
- Roll-up Price will roll the price of the option up into its master item. See example below.

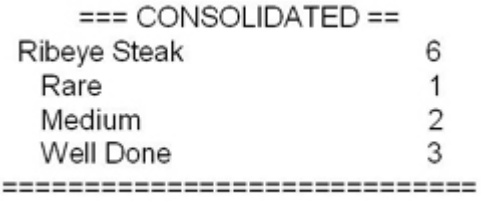
Printing Priority

Apply the printing priority number here. The higher the number is, the higher of priority it will have. Refer to the Sort Order Tab in Setup Network Printers for further information.

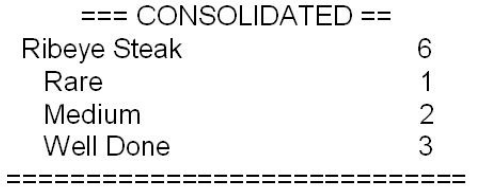
Consolidate On Orders

Check this box to identify that you wish to consolidate this item on a remote print.

Print consolidation works for Options as well as Ordering Products. For example, you place an order for 6 steaks (1 rare, 2 medium, 3 well done). Consolidation is set for both the steaks and the meat temperatures. The consolidated print will show the 6 steaks with indented consolidations for rare, medium and well done.



```
=== CONSOLIDATED ==
Ribeye Steak                6
  Rare                      1
  Medium                    2
  Well Done                 3
============================
```



```
=== CONSOLIDATED ==
Ribeye Steak                6
  Rare                      1
  Medium                    2
  Well Done                 3
============================
```

Refer to Printing Concepts for further information on consolidation.

Product Types

Ordering Product

An ordering product is any item that is listed on a menu is an ordering product. Ordering products have a price and will print on the receipt. An example of an ordering product is a [Ham Sandwich].

Option

An option is a modifier. Options may or may not carry a price. If the item is not priced, it will not print on the receipt (unless flagged as Print Always in Product Setup). An option must be associated to an ordering product. An example of an option is [Extra Cheese].

Kitchen Command

A kitchen command is a message that will print to a remote printer. It has no price and will not print on the receipt. An example of a kitchen command is [See Server].

Bussing Command

A bussing command is a message intended for bussing staff. It has no price, will not print on the receipt and has no screen button associated with it. Bussing commands are available through a pop up window when you select [Send Command] on the Table Layout screen. You will be asked to select the desired table, then the list of bussing commands will display. Upon completing this, the bussing command will print at the designated printer. An example of a bussing command is [Clear Table].

Seating Position

A seating position is an order marker allowing you to separate one person's order from another within the same check. Seating position allows you to separate people's orders on remote prints, split checks more easily and navigate through a table's order more efficiently. A seating position product has no price and does not show up on the receipt. A seating position product can be general such as [Seat] in which it will increment the seat number every time it is selected; or it can be more specific such as [Seat 1] in which it will specify seat number 1 whenever selected.

Rated Product

A rated product is a rental. Upon selecting it, the price of the item will increase as time passes. The timer can be stopped either by selecting the [Stop All Timers] function or by printing the receipt. An example of a rated item is [Pool Table].

Delay Print Command

A delay print command will pause remote printing. It is used when you want to delay the printing of certain items to the kitchen. For example, when placing the order, you select the appetizers, select [Delay] (which for example, is set to delay 10 minutes), then select the

entrees. In the kitchen, an order will print containing just the appetizers. Ten minutes later, another order will print containing the entrees. Delays can be programmed for any length of time using the [Time To Serve] field in Product Setup. Delays will not show up on the receipt.

Delays can also be based on the preparation time programmed into the products. For example, you order a soup and salad, apply a delay, then order a steak. The delay will look to the items ordered before it and delay the printing of the steak by the preparation time of either the soup or the salad (whichever is the longest). The [Time To Serve] field has to be empty in the Delay product and occupied in each ordering product.

Delay can also be applied in a Hold-And-Fire operation in which the delay will be indefinite. Using the previous example, the steak will not print in the kitchen until the server voids the delay. To apply this, the [Time To Serve] field must be empty in both the Delay button and all ordering products. You must also apply Feature Code 3 to the Delay command.

Merchandise

A merchandise item is a retail item. It is selected using a bar code scanner rather than through the touch screen. Upon scanning the bar code, the item will appear on the check. Merchandise items will show up on the receipt. An example of a merchandise item is [Large Polo Shirt]. The bar code is applied to the [Ref Code/UPC] field in Product Setup.

Minimum Charge

A minimum charge is a product that will adjust its price to ensure that the check total meets the minimum allowable amount. For example the establishment's minimum charge is $10. You select [Minimum Charge] and the check total is $10. You then order $6 of items. The minimum charge will change to $4 so the total is still $10. You order another $2 of items, the minimum charge will adjust its price again to $2, maintaining the total at $10. Once the amount of the check surpasses the minimum charge, the price of the minimum charge product will be zero and will not show up on the receipt.

Ticket Number

A ticket number is a product that asks you for a reference number. The number attaches itself to the description. A price can be applied to the ticket number and it can show up on the receipt. For example, the establishment sells boxes of expensive cigars that each have a serialized seal label. The server selects [Box of Cigars] and is prompted to enter the box's serial number. The receipt shows both the product description and the serial number.

Cover Charge

A cover charge is an admission ticket. When this item is ordered it generates a Ticket slip. This slip is then given to the customer as an entry ticket. An example would be entry into a theater. Ordering an [Adult Admission] would print up a Ticket on the local printer where the customer would take it for entry into the theater.

Recipe Item

A recipe item is used to post raw inventory usage. For example, the chef needs to process the inventory that was used for a buffet. Using the [Post Inv Usage] function button, it presents a list of all recipe item products. From this list, the chef selects the items and quantities that were used. This same function can also be used for recording waste.

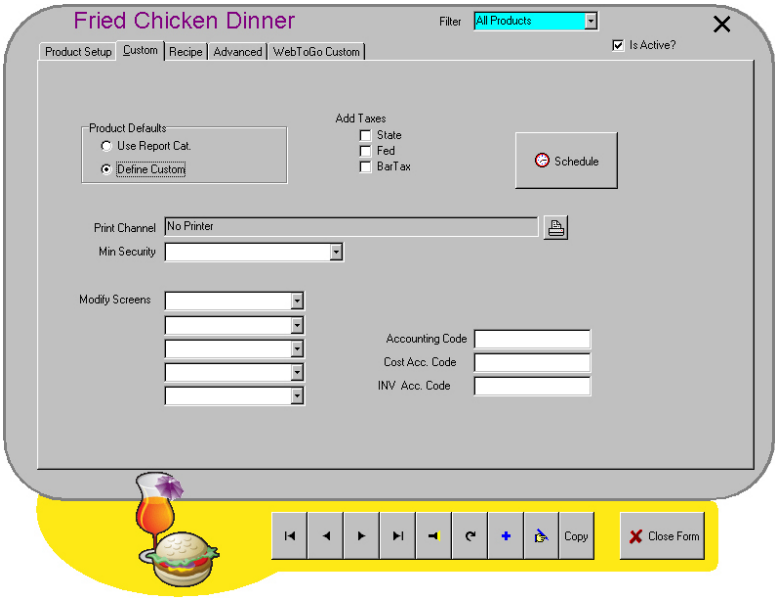
Manual Keyboard

A manual keyboard product allows you to type in a name or description. An example of this would be [Message To Chef]. Upon selecting this, a touch screen keyboard will be presented allowing you to type a brief message. This message is included on the remote print.

Custom Tab

Products / Product Setup / Custom Tab

This tab allows you to by-pass the programming inherited from the assigned Report Category. It will also allow you to apply a security level to the individual product.



Product Defaults

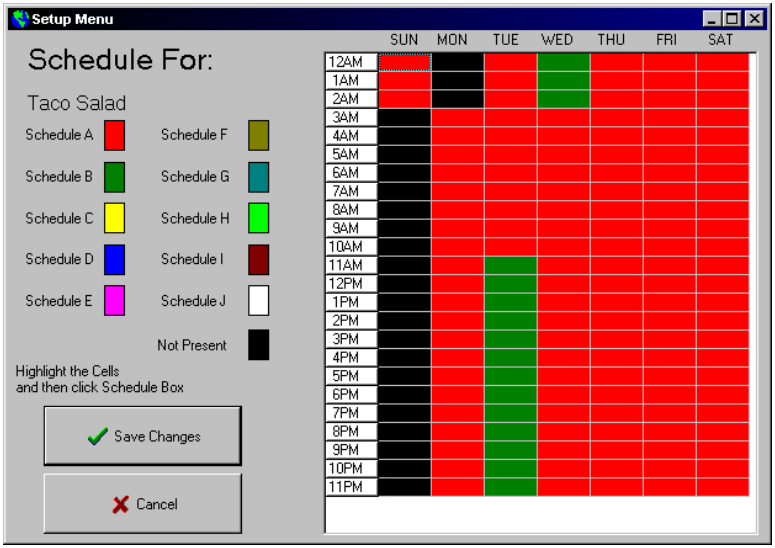
- Use Report Cat - Selecting this will gray out the taxes, schedule, print channel and modify screens fields. In doing so, the product will apply the settings defined within the Report Category.
- Define Custom - Selecting this will allow you to define the taxes, schedule, print channel and modify screens for this product.

Add Taxes

Select which taxes apply to this product.

Schedule

This presents a schedule screen. Click and drag on the schedule to select the time range. Then click on the color tile corresponding with the desired price level. There is also a Not Present selection which will render this product unavailable for order during this time.



In the above example, the Taco Salad is unavailable on Sundays and switches to Price B on Tuesdays from 11am till closing at 3am. Note that if the hours of operation extend beyond midnight, the schedule continues into the following morning.

Print Channel

Select the printer channel(s) where this item will print to. Refer to Printing Concepts for further information on printer channels.

Min Security

You can apply security to an individual product so that management authorization will be required in order to order the product. This would be used for expensive products such as rare bottles of wine.

Modify Screens

This is where you assign the modify order pages to a specific product. When the product is ordered, the order pages defined here will show up in the Modifier Grid on the order template. It is recommended that you ensure that these order pages are in the same order throughout the system, regardless of what item you select. For example, the first button would always be either a [Food Hold] or [Bar Hold] button.

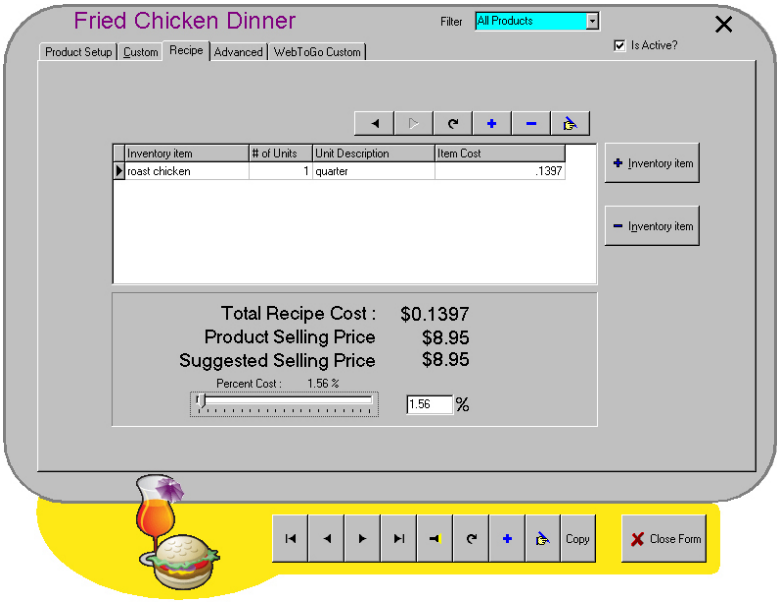
Accounting Codes

These fields are for reporting purposes only. They represent Accounting Code, Cost Accounting Code and Inventory Accounting Code. There are reports in Report Viewer which will present the contents of these fields.

Recipe Tab

Products / Product Setup / Recipe Tab

The recipe tab allows you to apply a recipe to the product. The system will record the usage of each applied stock item whenever the product is ordered, allowing you to generate an Inventory Usage Report. If used in conjunction with StockBoy, the system will also record the depletion of the applied stock items whenever the product is ordered.



+/- Inventory Item

Use these buttons to apply and remove stock items from the product recipe. When adding an inventory item, a window will display showing you all stock items. Select the desired item and press [OK]. It will then ask how many units to apply to the recipe. To remove an item, select the desired item, then [- Inventory Item].

of Units

This quantity is applied when you add the item. It represents the number of stock units that go into the recipe.

Unit Description

This is the unit descriptor pulled across from the stock item record.

Item Cost

The cost per unit of the stock item multiplied by the # of units.

Total Recipe Cost

This is the sum total of all item costs giving the total recipe cost of this product.

Product Selling Price

This is the selling price of the product (Price A).

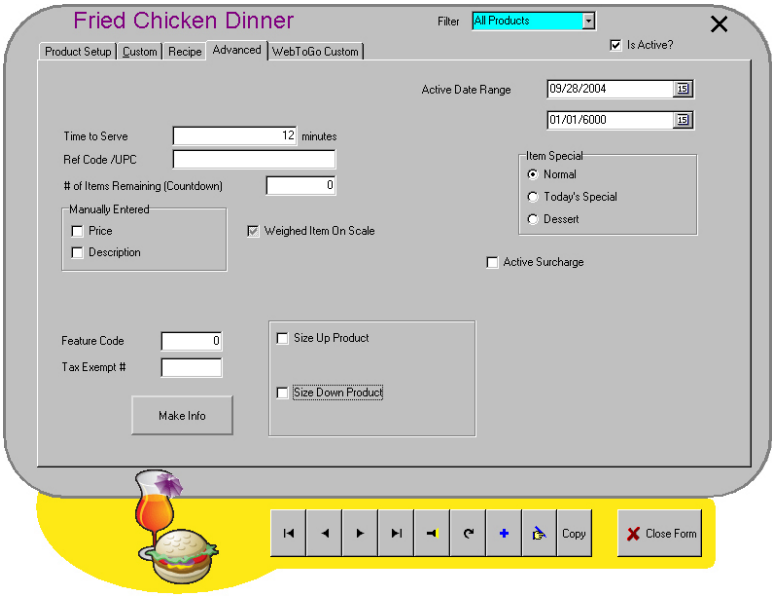
Suggested Selling Price

Use this field as a tool to determine a qualified selling price for the product. Utilizing the slide bar and percent field below you can determine what you could charge based on Recipe Cost and desired profit margin. In the previous example, the cost price of 1/4 chicken is $0.14. The selling price is $8.95. The slide bar positions itself automatically to show that the cost price of the meal is 1.56% of the selling price. Slide the bar up and down to see what you could charge and how much of that would be cost. Use the percentage field to enter an exact value. The slide bar will position itself automatically.

Advanced Tab

Products / Product Setup / Advanced Tab

The advanced tab contains settings fields to extend the functionality of the product.



Time To Serve

This field represents a number of minutes. If applied to an Ordering Product, this represents the time it takes to prepare and serve the item. If applied to a Delay Print Command, it can be designated any number of minutes. For further information, refer to Delay Print within Product Types.

Ref Code/UPC

This can represent either the PLU number or the UPC barcode number. If the product type is Merchandise Item, then you would enter the UPC code in this field. If using the PLU (product/price look up) custom function button, you can apply the PLU number here and retrieve the item using that number.

Of Items Remaining

This is used to enter the quantity available for this item. The number will appear in the corner of the product button. As it is ordered, the number will get smaller. When it reaches zero, the item will automatically be declared Sold Out.

Manually Entered

- Price - If checked, you will be prompted to enter the price of the item. This overrides any prices applied on the Product Setup tab.
- Description - If checked, you will be prompted to enter the description of the item. This description is reflected in both the remote prints and receipt.

Weighed Item On Scale

If the station has a weight scale plugged into it, this field will open the interface with that scale. Selecting this product, it will look to the weight on the scale and apply that as the quantity. Upon selecting this field, a Tare Weight field will be presented allowing you to enter the weight of the plate or container. This tare weight will be deducted from the total weight presented on the scale.

Feature Code

A feature code is a special numeric value which will allow you to perform special functions. For further information on feature codes, refer to the Feature Codes section in this manual.

Tax Exempt

This field is for reporting purposes only. Use it if the item is tax exempt and a special reference number or general ledger number needs to be applied.

Make Info

This presents a screen in which you can apply an image of the product and detailed description. This information will show up when [How To Make] or [Make Info] is selected at the front end. Use this to identify ingredients which may cause allergic reactions, preparation instructions, caloric content or any other pertinent information.

Active Date Range

Use this to set an active date range for the product. Using this, you can program an item to appear on the POS on a specified date and disappear after a specified date. This is ideal for programming daily and weekly specials or promotional items.

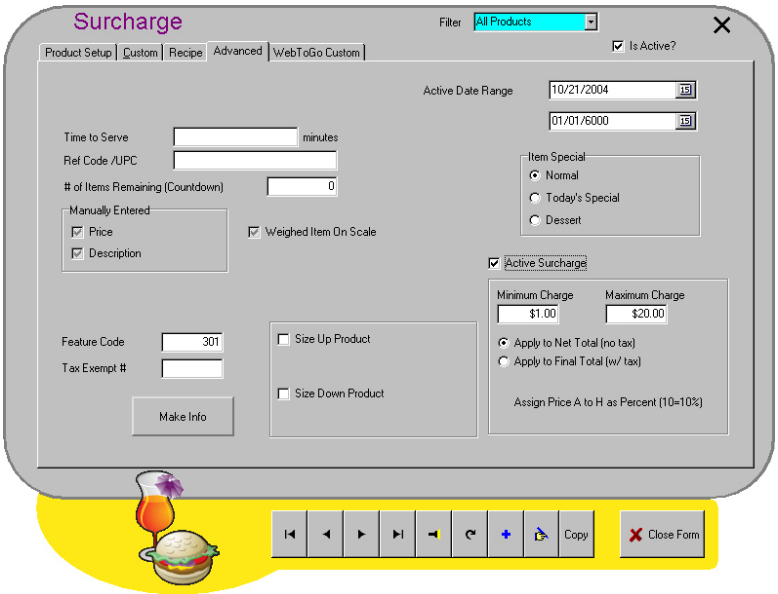
Item Special

Use this to identify the product as a Special or Dessert. If either is checked, the product will show up in the corresponding column in the Billboard screen. To remove the item from either column, simply check the Normal box.

Active Surcharge

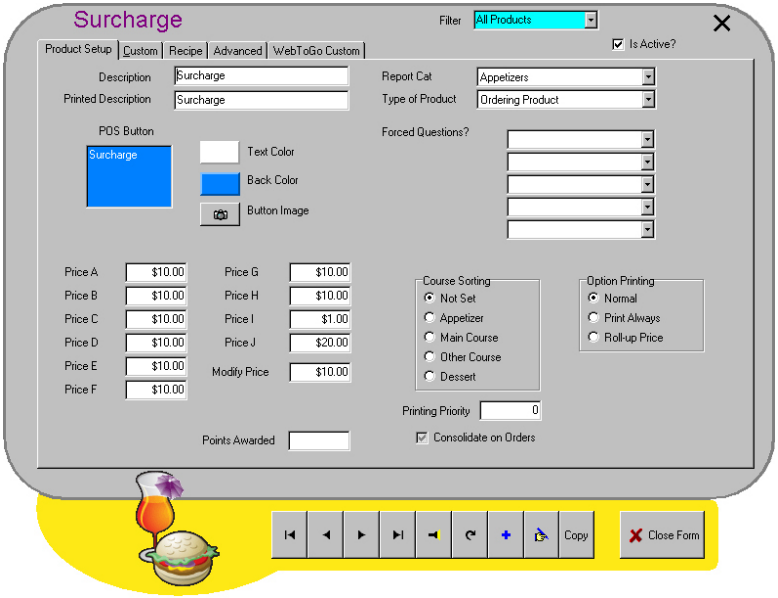
Located on the Advanced tab in Product Setup is a checkbox called Active Surcharge. A surcharge is an additional charge you wish to apply to the check. It is a percentage calculation based on either the Net Total (total before taxes) or the Final Total (total after taxes) of the check.

The image below demonstrates how you could apply it. Upon checking the Active Surcharge box, the surcharge definition window displays allowing you to define its parameters. Minimum Charge means that regardless of what the system calculates as the surcharge, the minimum amount it can apply is (in this case) $1.00. Maximum Charge means that regardless of what the system calculates as the surcharge, the maximum amount it can apply is (in this case) $20.00.



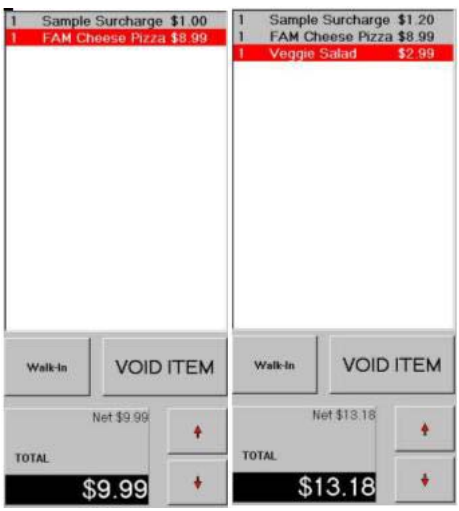
The check boxes below that allow you to indicate whether you want the surcharge calculated based on the Net total or Final total. This information is carried across to the Product Setup tab.

The image below demonstrates how the surcharge would be applied. Price Levels A through H now reflect the surcharge percentage to be applied for that price level. If you apply this to a transaction, the surcharge would be 10%. You can set different percentage levels for each price level (A-H).



Price Level I reflects the minimum charge you applied earlier. So let us assume you were working on Price Level A and the amount of the check came to $8.00. The 10% surcharge would be $.80. But because the minimum surcharge (Price Level I) is set to $1.00, the surcharge applied would be $1.00 instead of $.80.

Inversely, Price Level J represents the maximum charge you could apply. So let us assume you were still on Price Level A and the amount of the check came to $220.00. The 10% surcharge would be $22.00 but the because the maximum surcharge (Price Level J) is set to $20.00, the surcharge applied would be $20.00 instead of $22.00.



Applying this to front-end operations, I have applied the surcharge. It took the minimum value of $1.00. I then ordered a pizza for $8.99. Since I am using Price Level A, the surcharge is calculated at 10% or $.90. Since this is less than the minimum value, the surcharge remained as $1.00.

But when I ordered a salad, the net price increased to the point that 10% would exceed the $1.00 mark. So upon calculating the net total of the pizza and the salad ($8.99 + $2.99) it revised the surcharge to equal 10% of that total amount (being $1.20).

Active Surcharge works great in a delivery environment where you want to apply a delivery charge to the order. And you can set the Delivery Sales Type to Auto Order Item (being the delivery surcharge) so it is applied automatically with every delivery order.

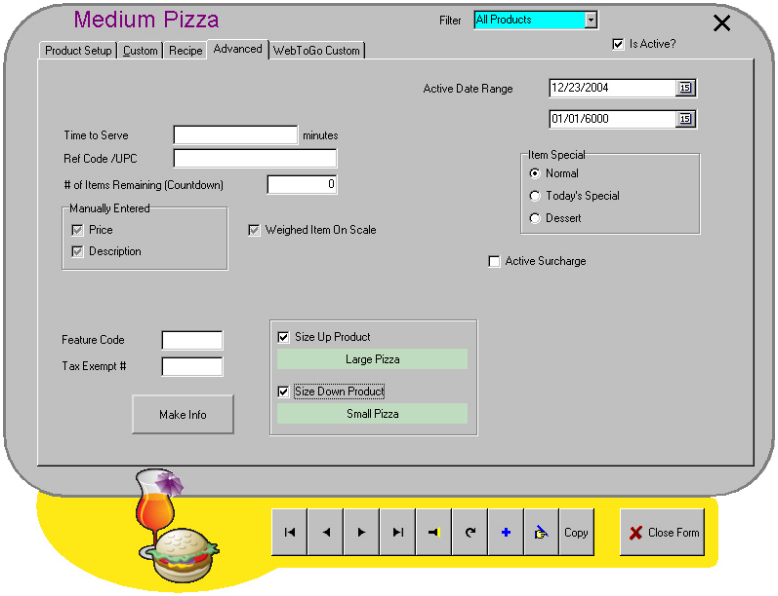
Size Up/Down Product

Size-Up and Size-Down are two functions which work in conjunction with each other to provide ease of use for the operator to adjust the size of a meal ordered. This function was designed for the quick service industry but may also be applied to table service environments as well.

It works particularly well with pizza and combo orders. In the case of pizza orders, if the customer wishes to change the size of their pizza (size-up or size-down), the toppings and related inventory recipes can be adjusted as well. The same applies in the case of combo orders in which someone may wish to “super-size” their combo. The corresponding size-up combo will contain the appropriate items (being a large fries and large soda) and the ingredients for inventory depletion will match up as well. Of course, price will adjust accordingly too.

To simplify the explanation of this, we will examine how to program a size-up and size-down. The establishment has three pizzas; small, medium, large. The price for each is $5, $7 and $9 respectively.

1. Program each product with its price.
2. Go to Product Setup for the Medium Pizza.
3. On the Advanced Tab, select [Size Up Product].
4. A bar will show up saying Not Selected. Click on this.
5. A window will display showing a list of all ordering products.
6. Select the [Large Pizza].
7. Returning to the Advanced Tab, select Size Down Product.
8. Click on Not Selected.
9. Choose the [Small Pizza].
10. Save.
11. On the order template, create two custom function buttons: [Size Up] and [Size Down].
12. Save.



Note: If the modifiers (pizza toppings in this case) also come in different sizes and prices, apply size up/down for each of these items as well. Upon sizing the master item, the modifiers will auto-size up/down as well.

- Order a small pizza ($5).
- Select [Size Up]. It changes to a medium pizza ($7).
- Select [Size Up]. It changes to a large pizza ($9).
- Select [Size Down]. It returns to the medium pizza ($7).
- Select [Size Down]. It changes back to a small pizza ($5).

The link between the three products is stationary regardless of which pizza you originally order. For example, you cannot jump from a small to a large without up-sizing to the medium pizza first. You can also extend beyond three items. For example, you can program a size up on the Large Pizza to link with an Extra-Large Pizza.

Feature Codes

Within the product setup screen is a field called Feature Code. You can use this field to apply special functionality to your POS system. An explanation of the various Feature Codes is listed below.

Feature Code 1

Tax Inclusive Pricing. The price of the product will include applicable taxes. The system will internally back-calculate the price of the item so that its price (plus tax) matches the price you entered. For example, Beer is priced at $4. Using feature code 1, the price (including tax) is $4. Without feature code 1, the price is $4 + tax.

This function is commonly used in situations where the bar menu is tax inclusive but the rest of the menu is not. Of course, establishments under VAT taxation laws would not require this since everything would be tax inclusive and this would be addressed using a tax DLL. It is important to remember that due to rounding and taxation issues, some tax inclusive prices may be off by a cent.

Note: Within Station Setup is a check box called “Use Tax Inclusive Pricing When Feature Code =1”. This must be applied to each station that will honor tax inclusive pricing. With that being said, it is possible to apply both tax-inclusive pricing and non-tax-inclusive pricing within the same establishment.

Feature Code 2

Default Print Locations. By default, when using an Ordering Product in a forced question the product will behave like an Option and will print following the master product it modifies. Use feature code 2 when you do NOT want the product to follow the item when printing. Instead the product item will print where it is normally set to print in system setup.

For example, you order [Wings & Beer]. The ordering products in the forced question are [Bucket Of Wings] and [Pitcher Of Beer]. The problem is, you do not wish the wings to print at the bar and the beer to print in the kitchen. Apply feature code 2 to the ordering products within the forced question. The wings will print in the kitchen and the beer will print at the bar.

Note: Feature code 2 will not affect OPTION products.

Feature Code 3

Hold & Fire. To do this, create a product called “Hold & Fire”. It’s product type is Delay print command and apply feature code 3. Do not apply any setting to the Time To Serve field in product setup. When placing an order, the system will send all items selected prior to applying the Hold & Fire. All items after it will be suspended until the server Voids the Hold & Fire line item. Multiple Hold & Fire items can be applied to a check.

For example, you order Soup, Hold & Fire, Steak, Hold & Fire, Pie. The soup will be sent. Upon voiding the first Hold & Fire, the steak will be sent. Upon voiding the second Hold & Fire, the pie will be sent.

Note: You cannot print a receipt with a HOLD AND FIRE item on it. The system checks for this and will not print. You cannot use the HOLD AND FIRE with rated items. The system checks for this and will auto-remove the HOLD AND FIRE.

Feature Code 4

Order Later. This is ideal for Full Meal ordering concepts. For example, you order the $20 Meal. This includes your choice of appetizer, main course and dessert. When selecting from the dessert forced question, you select a product called [Order Later]. This product uses Feature Code 4. The non-priced item will be applied to the check.

When the customer decides what they want for dessert, use the [Substitute] custom function button on the [Order Later] item and apply the desired dessert at that time.

Feature Code 5

Quantity Forced Questions. The forced question will be asked for each quantity item. For example, you use the quantity button to order 3 Steaks. Feature code 5 will ensure that the forced question of meat temp is asked 3 times instead of once.

Feature Code 6

Cannot Coupon Item. Regardless of programming throughout the system, no coupon discounts can be applied to this item.

Feature Code 9

Quantity Price Equals One. If the quantity for an item is less than one, the system will charge the same price as if the quantity were one.

For example, pizza toppings are $1 each. You split the toppings on a pizza. Feature code 9 would ensure that the half toppings would still be charged at $1 rather than $.50.

Feature Code 99

Manual Surcharge. A product using manual entered price with feature code of 99 will prompt for a % surcharge of the net total. This can be used for gratuity.

Feature Code 101-104

Auto Order Item. When feature code 101, 102, 103 or 104 is applied, the POS will automatically order the item when a transaction is started (ordering 104 items first, 103 items second, etc.).

Note: Some POS functions (such as selling Gift Cards) may be affected by the application of auto-ordered items. Take this into consideration before applying.

Feature Code 105

Auto Order Item Where Qty = Customers. Items with feature code of 105 will be automatically ordered in a quantity equal to the number of customers on the check.

For example, when opening a table with 3 customers, 3 seating positions could be automatically applied.

Note: Feature codes 101-105 only apply to table service mode.

Feature Code 301-302

Apply Active Surcharge. When programming an active surcharge (Product Setup / Advanced Tab) you use these feature codes to define how you want the surcharge applied to the check. Feature code 301 will apply the surcharge based on the Net Total. Feature code 302 will apply the surcharge based on the Final Total.

Feature Code 600-699

Linked Modifier Item Groups. This allows you to stipulate a condition to when certain modifiers can be applied to a check. They can only be applied if a linked master item resides on the check.

For example, a modifier item has feature code 605 can only be used to modify an ordering product that also contains feature code 605.

Feature Code 700-899

Linked Product Item Groups. This is similar to the linked modifier item groups except it applies to all product types. In this case, the 800 series of numbers scans the entire check to ensure there is a corresponding 700 series number. If present, the item can be ordered. If not, you cannot order the item.

For example, you cannot order [Soda Refill] with a feature code of 801 if the check does not contain [Soda] with feature code 701. Or you cannot order [Pie] with feature code 824 if the check does not contain [Full Meal Special] with feature code 724.

Note: Feature Codes 301-899 are only available within Version 7.x and greater.

Forced Questions

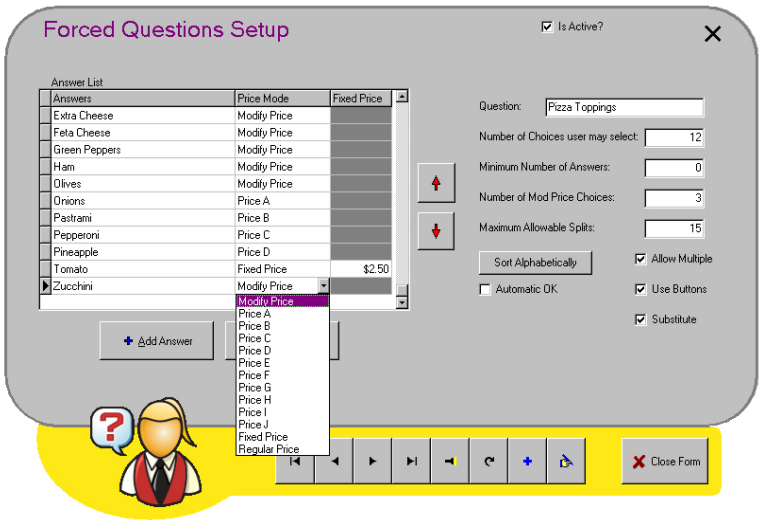
Forced Questions

Products / Forced Questions

A forced question (sometimes referred to as a forced modifier) is a pop-up window that appears when you order an item. It forces the user to select one of the answers which will be applied as a modifier. When reading a menu, you can see where forced questions need to be applied. If the item offers a choice of different options, that is where a forced question would need to be applied.

Examples of common forced questions are as follows:

- Dressings - French, Italian or Ranch
- Meat Temperature - Rare, Medium or Well Done
- Sauces - Mild, Medium or Hot
- Flavors - Vanilla, Chocolate or Strawberry



Answer List

This is the list of possible answers the user could choose from. Use the arrow keys to place the answers in any order. The Price Mode column allows you to apply a specific price level to that answer within that forced question. For example, pepperoni may be used in several forced questions. One question would use the pepperoni's modify price while another question may use the regular (scheduled) price and a third question may use one of the price levels. The Fixed Price column allows you to set a fixed price for the answer when used in this particular question.

+/- Answer

These buttons allow you to add and remove answers from the Answer List. Selecting [Add Answer] will present the product list. Choose the desired product and select [OK] to apply it as one of the possible answers. If the product does not currently exist in the product file, choose [New Item] to create it. You can then apply it to the forced question.

Question

The name of the question.

Number Of Choices User May Select

Define the maximum number of choices you want to permit the customer to choose. For example, the number of choices for a salad dressing would be one in that it would be unlikely that someone would want two (or more) dressings on a single salad. However, the number of choices for toppings on a pizza could be many in that customers may want to apply multiple (or all) topping choices to their pizza.

Minimum Number Of Answers

Define the minimum number of choices you want to permit. For example, if you wanted to permit none of the choices (suggesting plain), this could be set to zero. But if the question referred to something such as a cooking time, you would need an answer. In such a case, you would place a one in this field indicating that they must choose at least one of the answers.

Number Of Mod Price Choices

Along with the 10 price levels presented in Product Setup, there is an extra price field called Modify Price. This is used when an Ordering Product is used as an Option (such as adding a salad to a meal for only $1 where you normally charge $4 for the salad). You can program the forced question to use the price in this field rather than the conventional price levels.

Maximum Allowable Splits

You can split the items applied within the forced question. For example, you want a pizza with half-and-half toppings. This would be a split of 2. This field allows you to choose the maximum number of splits you want to allow the user to select.

When applied, the quantity of the answer will be proportional to the split, as will be the price and inventory depletion of the item. You do not have to apply the split as soon as the forced question displays. For example, you can order a pizza, apply pepperoni to the entire pizza, then apply the split for each topping after that.

Sort Alphabetically

This button will sort all answers alphabetically.

Allow Multiple

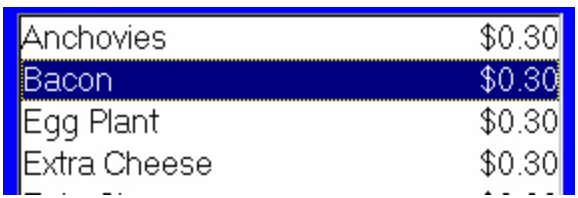
This check box will allow the user to select the same answer more than once. For example, you could order double or even triple cheese on a pizza. Please note however, that this only works if using the Button format (see Use Buttons, below). You can only select an item once in the list format.

Automatic OK

This will save a keystroke in situations where the user only has one choice to make. For example, the question asks you to choose a salad dressing. Only one selection would be required. Rather than select [French] then [OK] to move on, this check box will automatically assume the [OK] button after selecting [French].

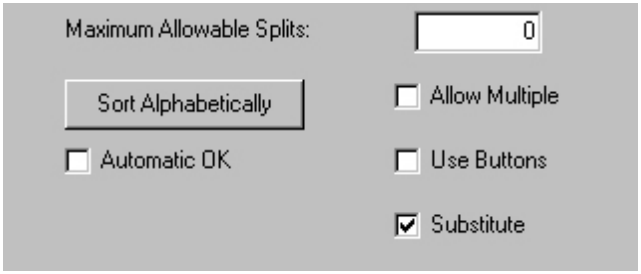
Use Buttons

Checking this box will display the answers as individual buttons. Un-checking it will display the answers in a list format. Use the list format when you have insufficient screen space to fit all of the button answers.



Substitute

Checking this box will allow you to go back to the selected answer and substitute one of the other answers in its place. For example, you could substitute Fries with Onion Rings. Both choices must appear in the forced question.

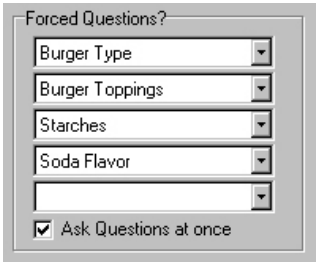


The substitute command is designed for single-selection forced questions. It is not recommended for questions involving multiple answers (such as pizza toppings).

Ask At Once

This feature combines multiple forced questions into one screen display. For example, you order a burger combo. It has several questions; choice of burger type, choice of toppings, choice of side and flavor of beverage. Rather than display them one at a time, they will all be displayed all at once. This allows the user the flexibility to apply the answers and make changes on the fly prior to sending the item with all answers.

Note: Notice that priced modifiers show up with the price included on the button display.



To apply forced questions all together, check the box below the list of forced questions within Product Setup.

Break – If you use the Quantity button to order an item with an Ask At Once forced question, a Break button will display in the bottom left corner of the forced question window.

Selecting it, allows you to apply different forced question answers for each separate item. For example, if a quantity of 3 was selected prior to ordering the Burger Combo, you could then select the Break button presenting the display below. This allows you to apply the Ask At Once question for each of the three combos. You can toggle between each order item. Selecting the OK button will then accept the answers for all three items.

Forced Questions From Product Setup

You can now search, add and edit forced questions directly from the Product Setup screen. Located next to the forced question selection lines is a search button which will allow you to do all of this without leaving Product Setup.

Combos

Products / Forced Questions

A combo meal is a single product comprised of a combination of several ordering products. The following explains how to program a typical combo.

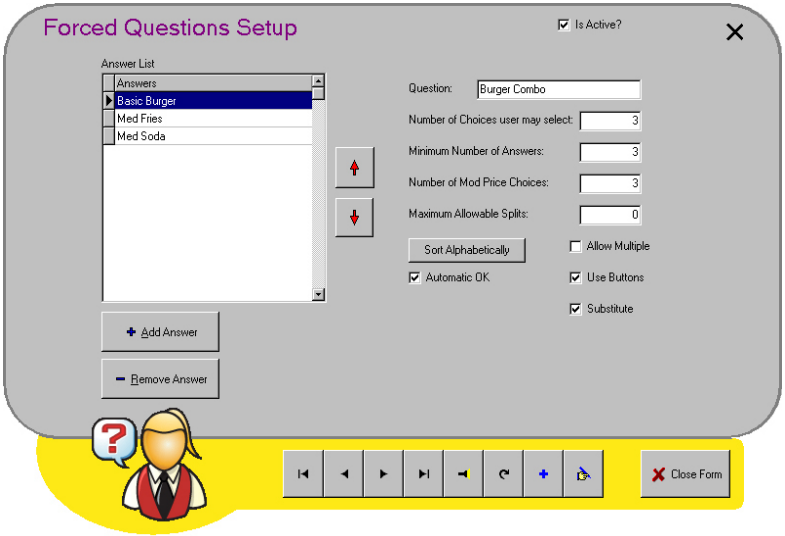
The Menu

The product Burger Combo consists of a hamburger, fries and soda. Here is a list of the individual items and the combo.

Product	Price
Hamburger	3.95
Medium French Fries	1.50
Regular Soda	1.50
Burger Combo	5.95

Creating The Combo

1. Begin by creating the [Hamburger Combo] product. It will be comprised of other products that can also be ordered as individual items (as shown above). If ordered as a combo, the price of $5.95 will save the customer $1.
2. Edit the three products that will go into the combo, making their Modify Price $0.
3. Create a Forced Question for the Hamburger Combo. In this example, the Forced Question will be comprised of three answers, being the three items that go into the combo.
4. Make sure the [Number of Choices], [Minimum Number of Answers] and [Number of Mod Price Choices] fields are all set to 3 (matching the number of answers in the Answer List). Also, check the [Automatic OK] box.
5. Save and apply the forced question to the Hamburger Combo product.



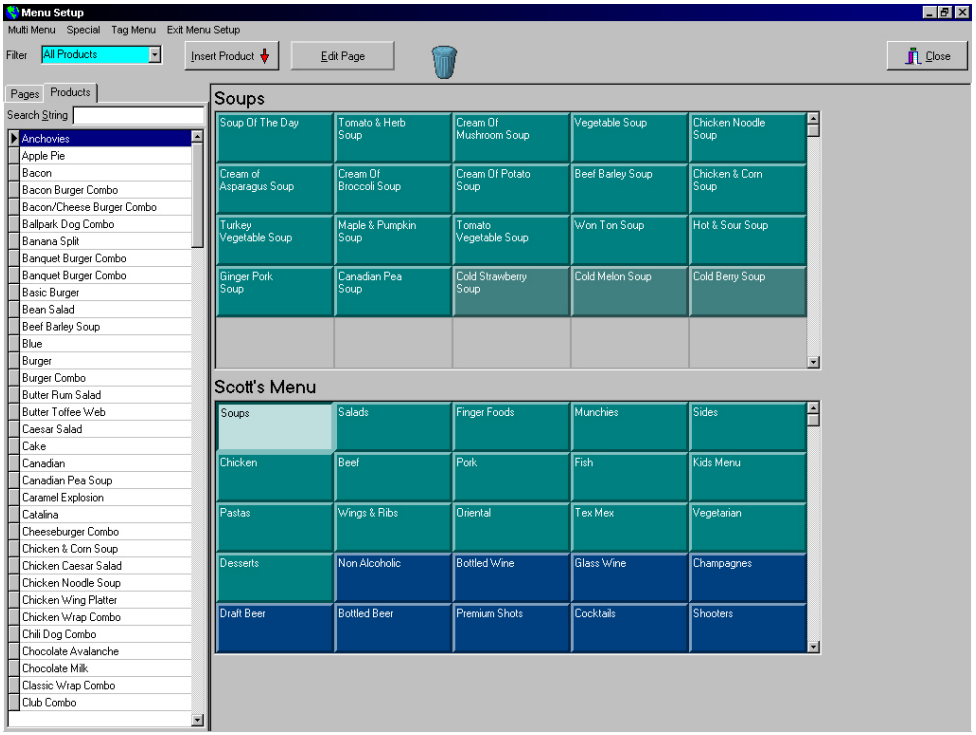
Upon ordering the [Hamburger Combo] at the front-end, you will see that the system automatically orders all of the answers in the forced question and gives them each a price of $0. If any of the combo components have forced questions of their own (such as the flavor of soda), they will be presented as well.

The Combo function can also be used in conjunction with the Size Up and Size Down buttons to "Super Size" or "Kid Size" the combo (changing the fries and soda to either a large or small size).

Menu Setup

Products / Menu Setup

The Menu Setup function allows you to design the menu order screen. From here you can create and modify order pages, create and modify products and assign both to their button locations on the order screen. The screen is divided into three sections.



Item List

The first section (on the left) is the Item List. It contains two tabs: PAGES contains a list of all order pages that have been created. The PRODUCTS tab contains a list of all products that have been created.

Order Page Grid

The second section is the Order Page Grid (located in the lower right area). This contains the buttons that appear in the order page grid on the front-end. To add an order page to this grid, select an order page title from the PAGES tab in the Item List section. Click-and-drag it to the desired button cell in the Order Page Grid.

Product Grid

The third section is the Product Grid (located in the upper right area). This contains the buttons that appear in the product grid on the front-end. To add a product to this grid, select the product title from the PRODUCT tab in the Item List section. Click-and-drag it to the desired button cell in the Product Grid.

Adding Items

Another way you can add an order page is by selecting an empty cell in the Order Page Grid, then right-clicking on the desired order page title. Select [Insert Page]. Or rather than right-clicking, you can select the [Insert Page] button.

Similarly, you can add a product to the product grid by selecting an empty cell in the Product Grid, then right-clicking on the desired product title. Select [Insert Product]. Or rather than right-clicking, you can select the [Insert Product] button. To change the product grid from one order page selection to another, simply select the order page title from the Order Page Grid or the PAGES tab. You will see that the title of the Product Grid changes to that order page title.

Creating & Editing Items

When you select an empty cell in either the Order Page Grid or Product Grid, a button in the toolbar section (next to the trash can icon) will change to [Create Order Page] or [Create Product] depending on which grid you select. Selecting this button, you will be presented with either the Order Page Setup screen or Product Setup screen. Upon saving the record, the item will be applied to the empty cell.

If you click on a cell containing an item (order page or product), the button in the toolbar button will change to [Edit Page] or [Edit Product]. Selecting this, you will be presented with either the Order Page Setup screen or Product Setup screen with the selected record already loaded and ready for editing. Upon saving the record, the item in the cell will be updated as well. You can also edit a product or order page by right-clicking on the button and choosing [Edit Page] or [Edit Product].

Positioning Items

You can arrange the buttons in any order on the grid by clicking and dragging from one cell to another. You can also remove the items from the grid by dragging them to the trash can icon.

Multiple Menus

If you have created multiple menus (using Multi Menu Setup), each menu can be accessed by selecting the [Multi Menu] pull-down menu at the top of the screen. When you select the desired menu, the Order Page Grid and Product Grid will change to match the order template programmed for that menu.

For example, the order template for the Dining Room menu may contain an order page grid consisting of 5 rows of 5 buttons. But if you select the Patio menu, the order page grid on its

template may be 3 rows of 8 buttons. The grids on the Menu Setup screen will change accordingly.

Modifiers & Modifier Pages

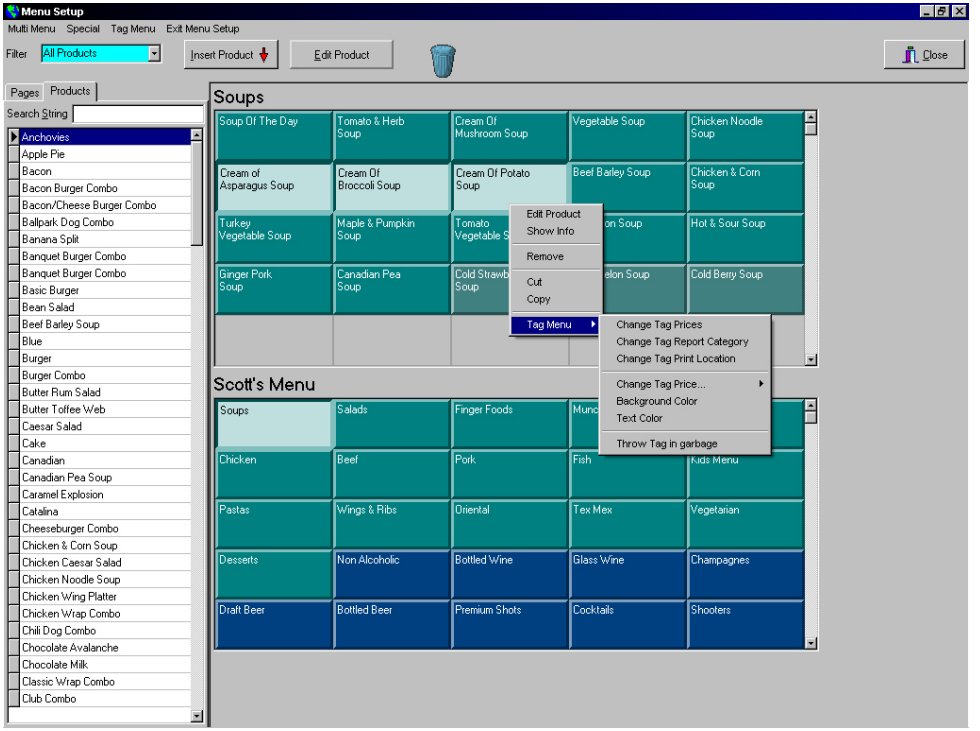
Modifier Page buttons are not applied here. They are applied within Report Category Setup. For this reason, you do not apply Modifier Pages to the Order Page Grid. But now the question arises, 'How do you add modifiers to the modifier pages?'.

You apply modifiers from this screen simply by selecting the modifier title on the PAGES tab. Upon doing this, you will see that the title of the Product Grid changes to the modifier title (just as if you had selected the order page button). At this point, simply apply the modifier products to the grid.

Tagging Products

You wish to apply a common change to multiple products. Rather than apply the change one product at a time, you can tag the products and apply the change only once.

1. Hold the CTRL button on the keyboard
2. Use your mouse to click the products that you want to make changes to. The button will be highlighted as it is tagged.
3. Select the [Tag Menu] pull-down menu at the top of the screen.
4. Select the desired function.



You can also retrieve the Tag selections by right-clicking on one of the tagged items and choosing [Tag Menu].

Special

The [Special] pull-down menu offers two selections. [Sort Page Alphabetically] will sort the contents of the product grid alphabetically. [Show Products From All Revenue Centers] allows you to view all products on file regardless of revenue center. The PRODUCTS tab automatically filters products matching the revenue center of the selected menu. This option allows you to share common items between revenue centers.

Members

Member Concepts

Client Retention

Some establishments may want to reward their customers, especially those who are repeat customers. The establishment can track and reward purchases made by granting those customers membership. As a member, the customer can acquire points which are assigned to specific products. These products can vary in value and as they are ordered, the points will accumulate within the member record. Upon achieving a certain number of points, the member can redeem them for rewards such as a discount or promotional item.

Reservations and Ordering

Member records also serve to retain pertinent information for functions that require the use of customer information.

In the case of a **reservation**, the establishment will require a name and phone number in order to hold a table for a customer. The member function is used for this.

Similar to a reservation, the establishment will require a customer name and phone number for **take out orders**. This links the order to a person's name for retrieval when the customer arrives. The phone number would be required in case it was necessary to contact the customer regarding the order.

In the case of **deliveries**, the establishment would require further information such as an address and directions for delivery. Again, the member record would serve this purpose.

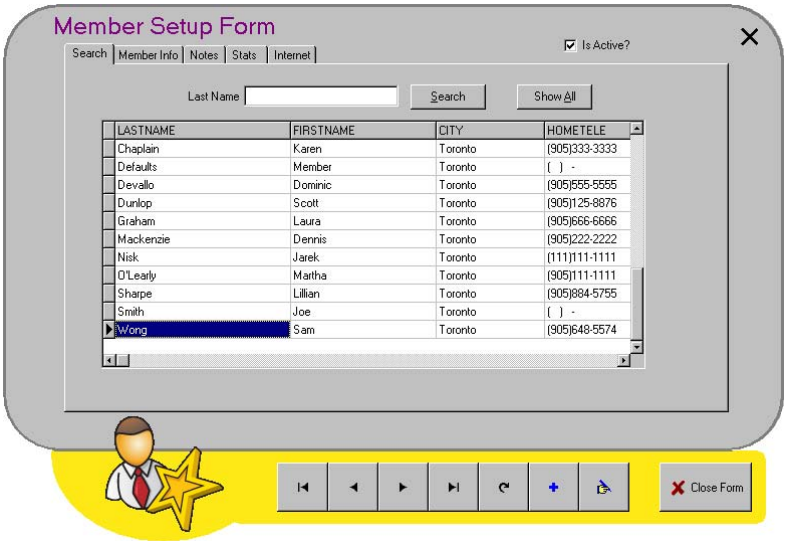
When an order is placed over the **internet** (using WebToGo™), member information would also be required here to link the order to a specific customer and provide delivery or pick up information.

Setup Members

Search Tab

Members/VIP / Setup Members / Search Tab

The search tab allows you to quickly retrieve a member record.



Last Name

Enter the last name (or portion of it) to filter the member records down to those that match what was entered. Upon entering the search information, select the [Search] button to filter the member records.

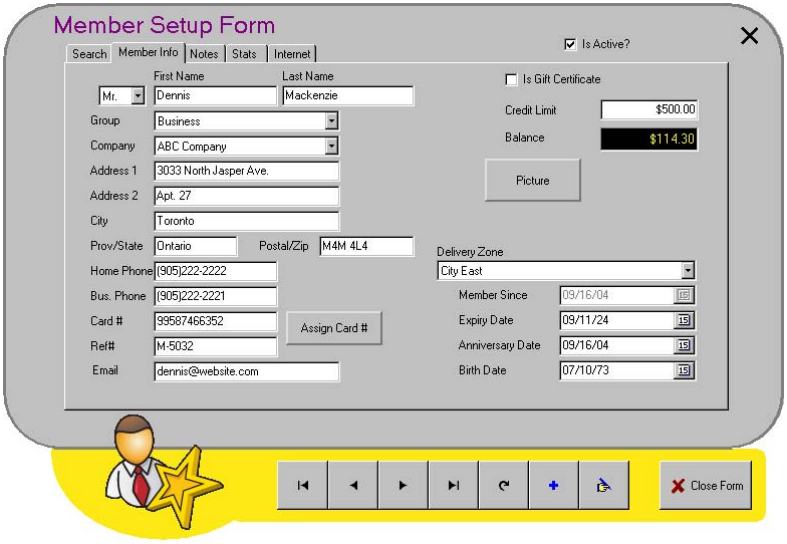
Show All

This will display the entire list of member records. Use the scroll bars or keyboard arrow keys to scroll through the list. Upon selecting the desired record, you can click on any of the other tabs to retrieve the record.

Member Info Tab

Members/VIP / Setup Members / Member Info Tab

This tab contains the member information.



Card

The member can be retrieved by name, phone number or card number. You can assign the member a swipe card or manual entry number for quick retrieval. Member swipe numbers should start with 99. Located next to this field is the [Assign Card #] button. Select this, then either swipe the card or select [Manual Enter] to type in a number (which does not have to begin with 99).

Ref

This is used for reporting purposes only.

Is Gift Certificate

A gift certificate (gift card) is a member record that has a credit balance on it. Checking this box tells the system that the balance reflects pre-purchased funds. As these funds are spent, the balance will reduce yet the amount owing will not increase as these funds are not owed to the establishment (like in a credit situation). Gift certificate balances can be replenished. In the event they are not replenished, the member card can still be used for member retrieval in the even point redemption programs are also being applied.

Credit Limit

Members can be granted a "house account" credit limit with which the member can pay On Account. In doing this, the amount owing on the check will be deducted from the Credit Limit field and added to the Balance field. The member would then be invoiced at a later date for the outstanding balance. Make sure Is Gift Certificate is NOT checked.

Note: PixelPoint's CreditCheck™ program is required if applying either member Gift Certificates or Credit Limits.

Picture

You can apply a jpeg image of the member to their record. This image could then be printed on a member swipe card.

- Select Source - If multiple source are available (such as a scanner, a digital camera, etc.) you select the image source within here.
- Acquire Image - This pulls the image from the source.
- Print VIP Card - If a card printer is attached to the system, this will apply pertinent member information and picture to the card.
- Load Image - Allows you to load a pre-saved jpeg image on the hard drive.

Delivery Zone

This helps to reduce the randomness of delivery destinations by allowing you to assign members to delivery zones. For example, if several orders are ready to be delivered, you could have one driver to deliver orders to the East and another driver deliver orders to the West.

Dates

- Member Since - When the member record was created.
- Expiry Date - When the record is no longer active.
- Anniversary Date - Special member date.
- Birth Date - Member's birthday.

Member Defaults Record

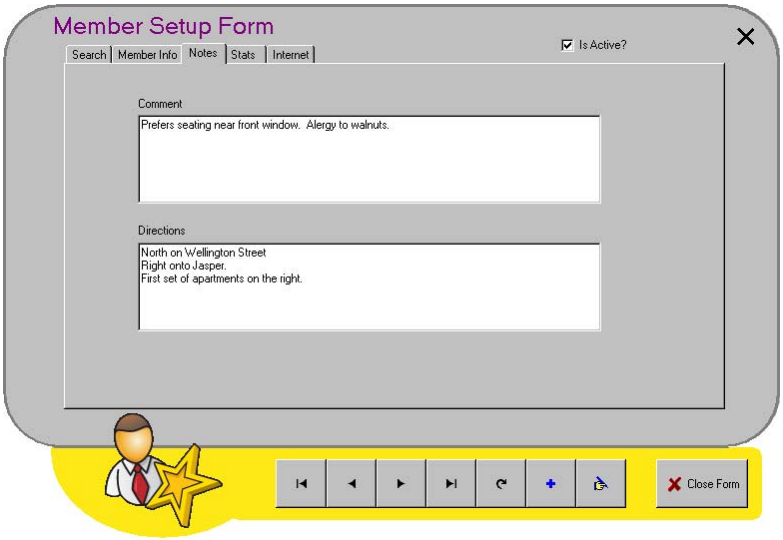
This record appears automatically on the Search Tab. Any changes you apply to this record will be transferred as default field settings when you create a new member record.

Notes Tab

Members/VIP / Setup Members / Notes Tab

Comment

This tab contains a Comment window with which you can enter pertinent information that is only viewable from the member's record. It does not print anywhere.



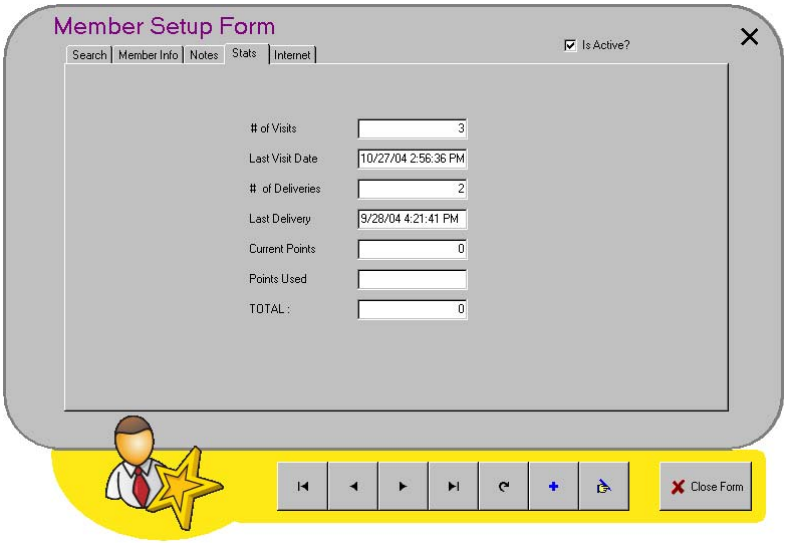
Directions

This field contains driving instructions to get to the member's address. This information will print on the delivery order so that the driver will know how to get there.

Stats Tab

Members/VIP / Setup Members / Stats Tab

Information contained on the stats (statistical) tab is applied automatically as the member is used on the system.



of Visits

Count of all non-delivery transactions in which this member was applied to the check.

Last Visit Date

Date of the latest Visit transaction.

of Deliveries

Count of all delivery transactions in which this member was applied to the check.

Last Delivery

Date of the last delivery for this member.

Current Points

How many points the member currently has.

Points Used

Total number of points the member has redeemed.

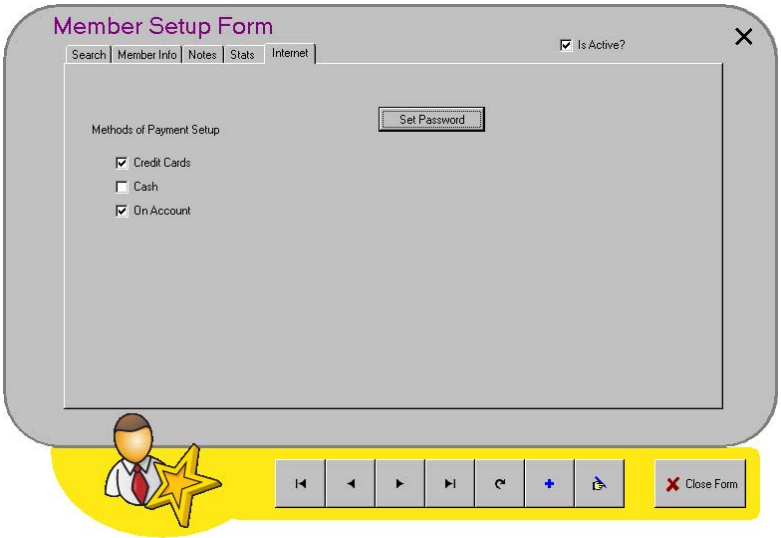
Total

Total dollar value the member has spent.

Internet Tab

Members/VIP / Setup Members / Internet Tab

Allows you to designate which methods of payment this member can apply to web-based ordering (using WebToGo™).



Set Password

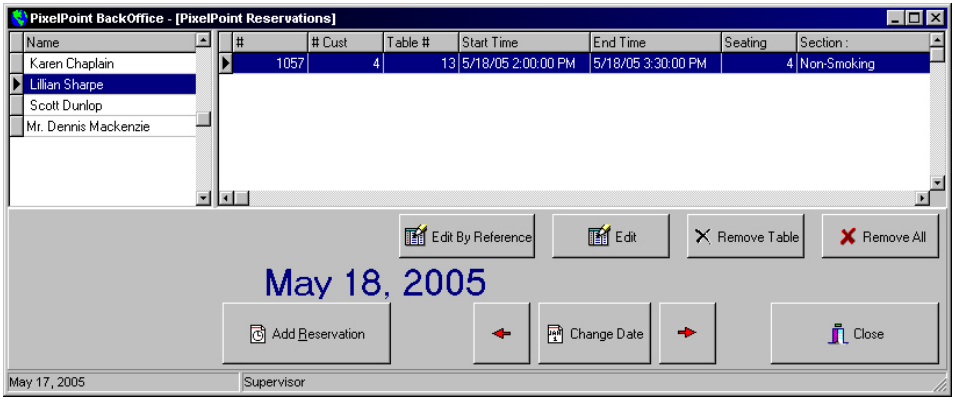
Allows you to apply the password for the member to access and use the WebToGo system.

Note: This tab is not visible until [System Uses WebToGo] is activated within Administrator / WebToGo Setup / Website Setup.

Reservations

Table Setup / Reservations

You can view, edit and accept dining reservations from the BackOffice system.



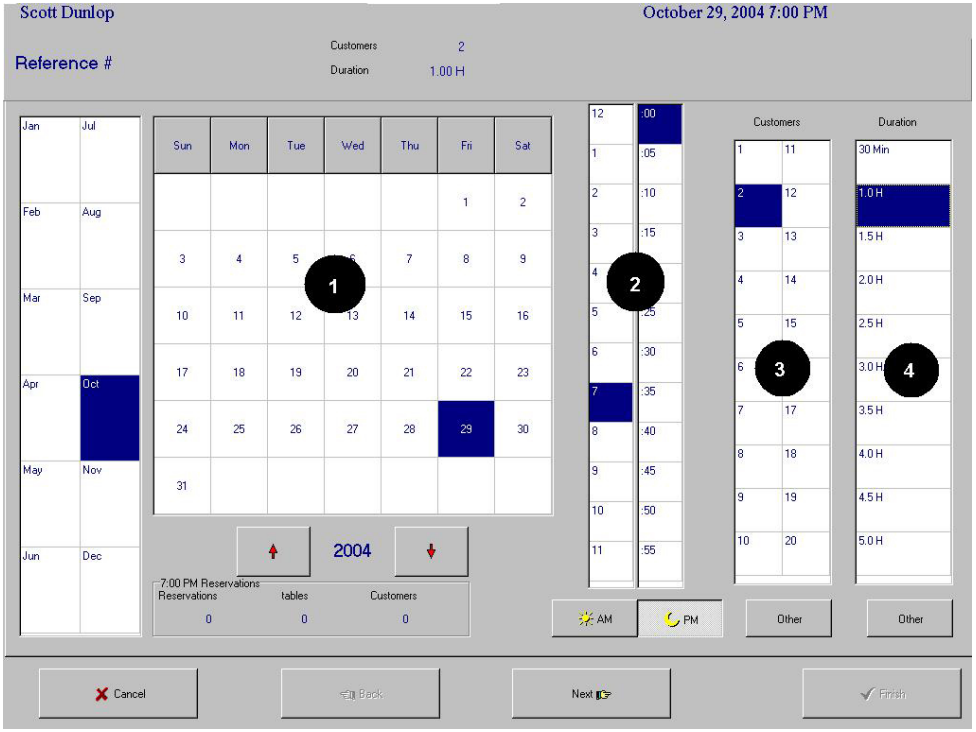
Viewing Reservations

The Name window on the left shows all reservations for the given day. Selecting any one of them will show the details of the reservation on the right. In the case member Lillian Sharpe has reserved table 13, party of 4 in the non-smoking section, for 2:00pm on May 18th.

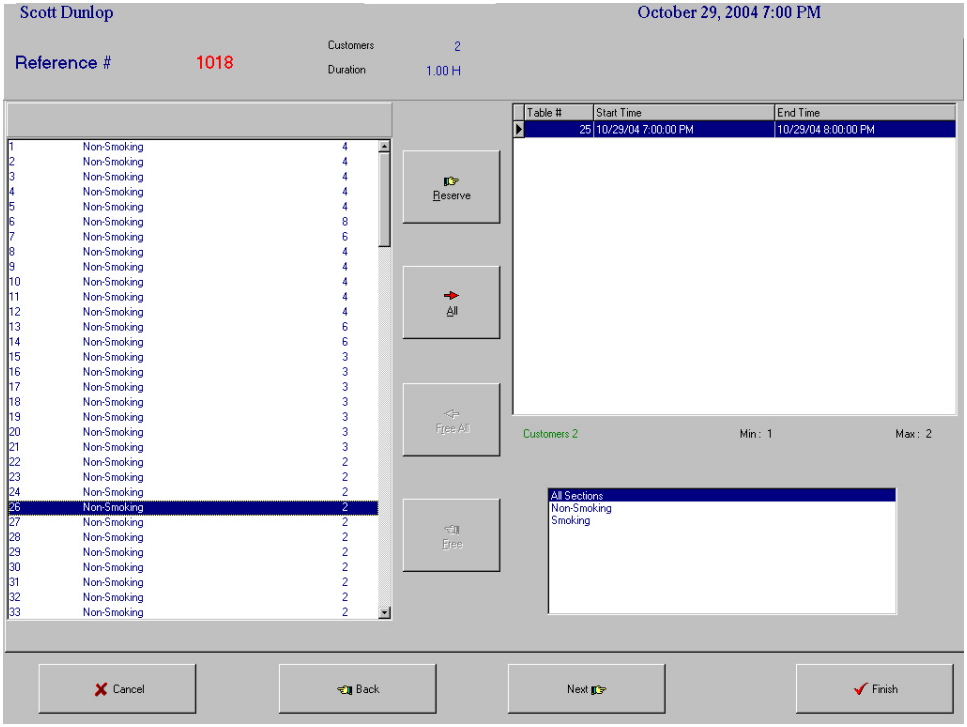
You can view the reservations for any given day using either the arrow buttons or the [Change Date] button.

Adding Reservations

1. Select [Add Reservations]
2. The Reservation Details screen will display (see below)
3. Select the desired year, month and calendar day for the reservation (1)
4. Select the desired time (2)
5. Select the number of guests who will be dining (3)
6. Select the estimated duration of the reservation (4)
7. Select [Next]



8. On the next screen (see below), you pick the table to reserve. The guest can stipulate a specific dining section, specific table or group of tables. You can reserve an entire dining section or the entire restaurant if necessary.



9. At this point you can select either [Next] or [Finish]. If you select [Next], you can then identify the reason for the reservation (such as an anniversary or birthday) and also add a comment.

Editing A Reservation

1. From the main Reservation screen, select the reservation you wish to edit.
2. Select [Edit] (you can also edit by reference number if that is provided to you). The reservation will be presented.
3. At this point, you must first remove the table(s) assigned to that reservation before changing any other information.

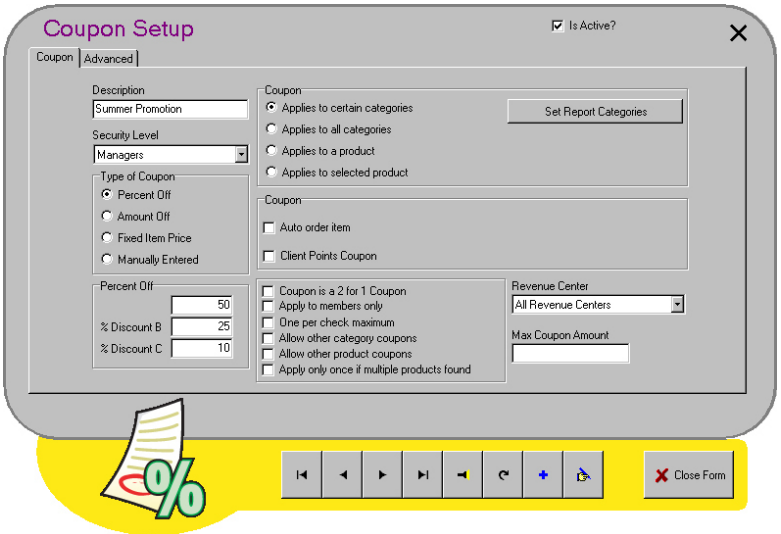
The reason for un-reserving the tables is to ensure that the selected tables are appropriate for the revised reservation. For example, if you reserved Table 3 for 6:00 and needed to move the reservation to 7:00, that may conflict with another reservation on Table 3. Or if the number of customers changes from 4 people to 6, the 4 seat table originally selected would be inadequate for that number of guests.

Note: Licensing for PixelPoint's TableTime™ module is required for this function to work.
Make sure you have checked [Use Reservations] in Administrator / Setup System / System Tab

Setup Coupons

General Setup / Setup Coupons

This application encompasses coupons, discounts and member incentive rewards. There is no limit to how many you can program and provide.



Description

This is the description of the coupon. It will show up on the Finish screen under either Coupons or Special (which applies to member incentives).

Security Level

You can restrict usage of this coupon by selecting the minimum job position required to apply it. For example, a server may be able to apply a 10% discount but not a 100% discount.

Type of Coupon

There are four types of coupons that can be applied:

- Percent Off - Deduct a percentage such as 10% off.
- Amount Off - Deduct a dollar value such as $10.00 off.
- Fixed Price Item - Discount all applicable items down to a set dollar value. For example, any large pizza is $10.00 regardless of regular price.
- Manually Entered - Deduct a dollar value that is determined at the time it is applied.

Percent Off

You can apply three separate values that will match to a coupon schedule on the Advanced Tab. For example, a coupon may be good for 20% off except on Tuesday when prices are

reduced. On Tuesdays, the coupon is 10% off. This area will also be replaced with Amount Off if the type of coupon is Amount Off. It will be replaced with the Fixed Price field if the type of coupon is Fixed Price Item.

Applies To Certain Categories

Restricts the application of this coupon to specific report categories. For example, 10% off any Soup or Salad.

Applies To All Categories

Applies this coupon to the entire check.

Applies To A Product

Restricts the application of this coupon to a specific product. For example, 10% off Tomato Soup.

Applies To Selected Product

Applies this coupon to an item that is selected at the time the coupon is applied. For example, you select the Tomato Soup that was ordered, then apply a 10% discount.

Auto Order Item

Will automatically order an item when this coupon is selected. For example, the coupon is for a promotional item and this function auto-selects that item.

Client Points Coupon

Indicates that this is a points redemption coupon. Checking this will present a field to which you apply the point value for this coupon. Any member who achieves that point value will be eligible. Upon using the coupon, that point value will be deducted from their points balance.

Coupon Is A 2 For 1 Coupon

When identified to an item, this coupon will look for a matching item and apply the discount to it. In the event a matching item is not present, it will look for the next closest priced item on the check and apply it to that. For example, the coupon is 2 For 1 large pizza, yet the order contains one large, one medium and one small pizza. The coupon will apply to the medium pizza.

Apply To Members Only

Restricts availability of this coupon to checks that contain a member. The coupon will not appear when the Coupon button is selected but will appear when the Specials button is selected (both buttons are on the Finish screen).

One Per Check Maximum

You can only use this coupon once per check. If unchecked, you can apply it multiple times on the same check.

Allow Other Category Coupons

Restricts or allows the use of other coupons on the same check. However, this isolates the use of coupons that apply to specific report categories.

Allow Other Product Coupons

Restricts or allows the use of other coupons on the same check. However, this isolates the use of coupons that apply to specific products.

Apply Only Once If Multiple Products Found

Restricts the use of this coupon to only one applicable item in the event there are several applicable items on the check. For example, the coupon is for a free slice of pie. However, four slices were ordered. This would allow the coupon to apply to only one slice.

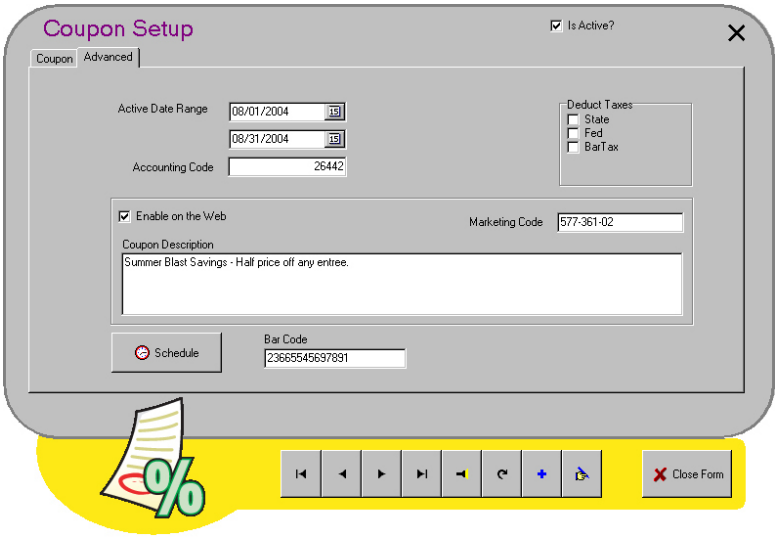
Revenue Center

Restricts application of this coupon to a specific revenue center.

Max Coupon Amount

Places a dollar value cap on the coupon. For example, the coupon is 50% off your order but up to a maximum savings value of $20.

Advanced Tab



Active Date Range

Applies a start date and end date to the coupon. These dates default to a start date of current date (effective immediately) and a very distant expiry date (effective indefinitely). They can be changed to allows you to program future promotions with specific cutoff dates.

Accounting Code

This field is for reporting purposes only. You can place a reference code in this field such as a general ledger account code.

Deduct Taxes

Indicates whether to include or exclude the taxes from the discount. For example, a 100% off coupon could apply to the total before taxes or total after taxes.

Enable On The Web

Indicates that this coupon is to be made available on a WebToGo system.

Marketing Code

This is used to apply the code via the internet. The code is to be printed on all of the coupons. Entry of the code applies the coupon to the WebToGo check.

Coupon Description

This displays on the internet when the coupon is selected via WebToGo.

Schedule

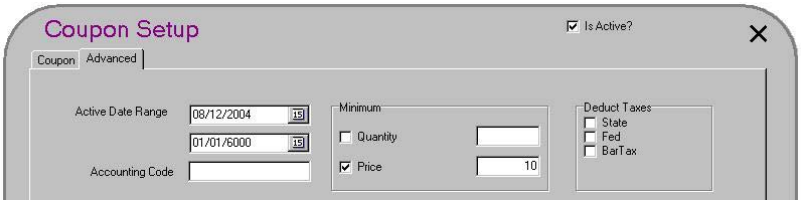
Allows you to schedule different values to the coupon based on a time schedule that you define here. Refer to Percent Off regarding applying the different values.

Bar Code

Enter the UPC (Universal Product Code) that matches the barcode printed on the coupon. Scanning the barcode will automatically retrieve the coupon.

Minimum

You can apply a minimum quantity and minimum price to a coupon.



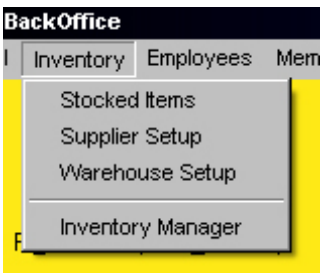
This will restrict the application of the coupon unless the order surpasses the minimum quantity or dollar value. For example, if "Minimum Price" is set to $10 and you try to apply it to a check for $8, the coupon will be rejected.

Inventory

Inventory Without StockBoy

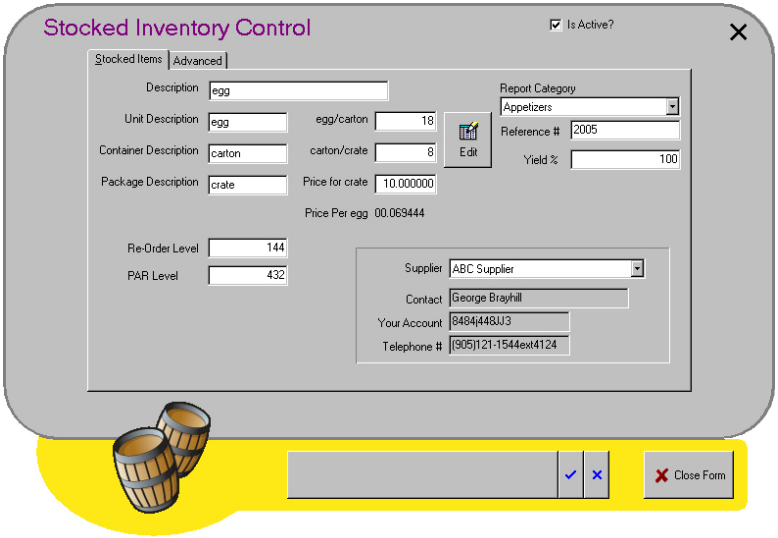
You can apply basic inventory functionality to your PixelPoint POS system right out of the box. This is done by creating stock items and applying them to product recipes. In doing this, the system will record the usage of those stock items as the products are ordered. You can then run an inventory usage report to see what quantities of stock you have used.

This form of inventory is ideal for establishments that want some reasonable inventory control without investing the time, effort and money into maintaining a full-blown inventory system. The Inventory Without StockBoy solution is virtually maintenance-free and once set up, the only labor required is to run the Inventory Usage report.

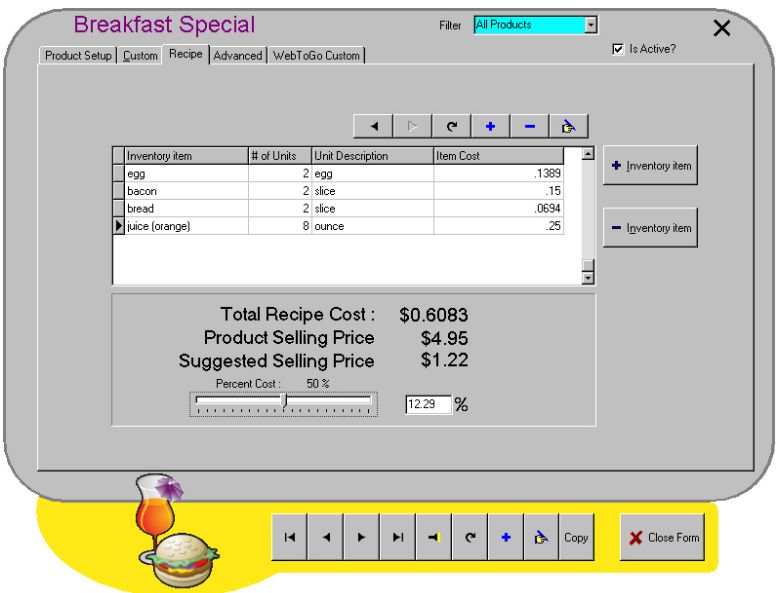


How To Apply It

1. Create a report category for stock items. This will help to keep stock items separate from ordering items. Refer to Report Category Setup for further information.
2. Acquire a list of all stock items that will need to be applied. Packaging information would also be helpful, such as how many slices of bread are in a loaf.
3. Acquire a list of all recipes. If a pre-made list is unavailable, you may need to review the contents of every menu item with the chef.
4. Create the stocked items. When creating the stock item, make sure you apply the unit in a manner that suits the recipes. For example, what is 1 unit of Tomato? Some establishments may only use tomatoes as slices. So a unit could be a slice rather than a tomato. Other establishments however, my also use it diced in salads or blended in sauces. In such cases, 1 unit of Tomato might be best represented as a tomato or cup or ounce. When creating a stock item, carefully consider how it is going to be applied in all applicable recipes and choose a unit that best covers all situations. Refer to Stocked Items for further information.



5. In the Stocked Inventory Control screen, the field [Price For Crate] would be grayed out if StockBoy were activated. This is because the cost per unit is calculated based on orders and since you are not using the Inventory Manager to establish purchase prices, you must enter a price per package in here. Based on this value and the quantities applied in this screen, the system will calculate a static cost per unit. Apply the package price on each stock item.
6. In Product Setup, create the recipes for each product sold (regardless of whether it is an ordering product or option).



The system will multiply the cost per unit for each recipe item by the quantity applied to the recipe and total this to establish a total recipe cost. Comparing this to the selling price, you will be able to see what your profit is and determine the percent of cost for that product.

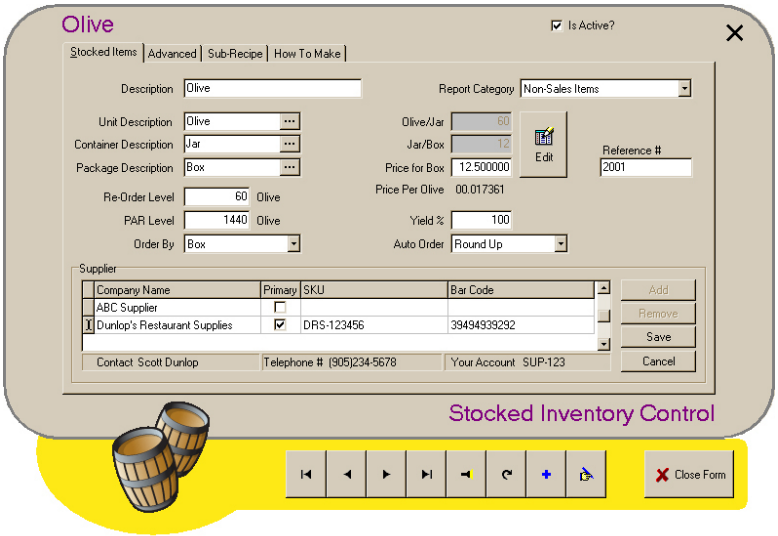
With the stock items created and applied to the recipes, **no further data entry is required for inventory**. As the products are ordered, the system will record usage of the stock items attached to the recipes. Located within both Report Viewer and DataMiner are Inventory Usage and Sales Profit reports. These will show what stock items and quantities were used and how much profit you made.

Note: This programming will migrate to inventory using StockBoy.

Stocked Items

Inventory / Stocked Items

Stock items are broken down to three levels; unit, container and package. When defining your units, containers and packages, it is important that you have a clear understanding of what each represents with respect to recipes, warehouse counts and ordering.



Unit

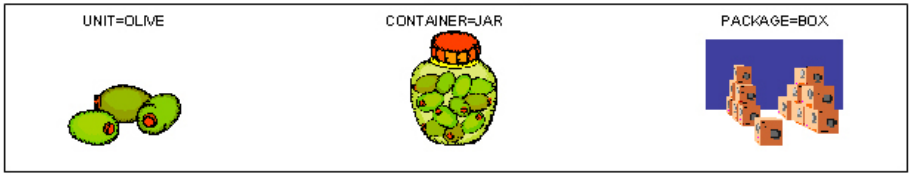
You apply units to recipes. When the item is ordered, its recipe depletes the stock items by those units. For example, a unit of rum would be an ounce. You apply 1 or 2 or whatever ounces of rum to its respective beverages. When entering in the unit description, make sure it represents a unit measurement that will be applied to all applicable recipes.

Container

A container is the next step up from a unit. For example, the container for an ounce of liquor would be a bottle; the container for a slice of bread would be a loaf; the container for a pickle would be a jar.

Package

This is the next step up from a container. Generally, this is what the stock item is shipped in. Descriptors at this level are generally things like cases, crates, pallets and so on.



Note: When applying descriptors to Units, Containers and Packages, you have a search button [...] to the right of each field allowing you to select from a list of pre-existing descriptors. This will help to standardize the application of descriptors throughout the system. In the event the desired descriptor is not present, you can add it to the list.

Unit/Container

The descriptors are carried across to the middle column. In the above example, the title of this field would change to Olives/Jar. In this field, enter the number of olives that go into a typical jar. For example, there may be 60 olives/jar.

Container/Package

Again, the descriptors are carried across, changing the title to Jar/Box. In this field, enter the number of jars that go into a box. For example, there may be 12 jars/box.

Note: Upon saving the stock item record, the units/container and container/package settings will be locked into place. They can be changed using the [Edit] button just to the right of them. However, this will only work if there is zero in stock. Once the stock item has a quantity in stock, the unit/container and container/package numbers cannot be changed.

Price For Package

Enter the general price for a package of the stock item. The system will divide the package price by the number of units that go into it to determine the Price Per Unit (displayed under this field).

Note: This field is only available is using Inventory Without StockBoy. If StockBoy has been activated, this field will be grayed out.

Report Category

Assign the stock item to a report category.

Reference

This number is automatically created by the system. You will be able to look up this item by that number later on.

Reorder Level

Reorder and Par levels are based on units. Referring back to the olives, if you wanted to reorder when you are down to 1 box, you would enter 720 in this field (60 olives x 12 jars = 1 box).

Par Level

The Par level represents the optimum level you want to bring the stock up to. So if you wanted to replenish your olives to 4 boxes, you enter 1440 (720 olives per box x 2 boxes).

Order By

This field allows you to specify the default level of measurement when ordering this product. It will offer you the selections of Unit, Container and Package.

Yield %

Yield represents the amount of this item that is usable. For example, a head of lettuce would have an 80% yield in that the core would be unusable.

Auto Order

When using the Auto PO function, this field will allow you to round up or down to the nearest Order By level. You can also set it to Allow Partial in which no rounding. For example, if the PixelPoint noted that 4 jars of olives would be used by the shipping date, the Auto PO may show as follows:

- Round Up = 1 box of Olives.
- Round Down = 0 box of Olives.
- Allow Partial = 240 Olives (being 4 jars).

Suppliers

This window will allow you to enter multiple suppliers for the item. This selection includes a check box to indicate which is the primary (default) supplier as well as fields for applying SKU and Bar Code numbers. The corresponding contact name, phone number and account code for the selected supplier will also be shown in the fields below this area.

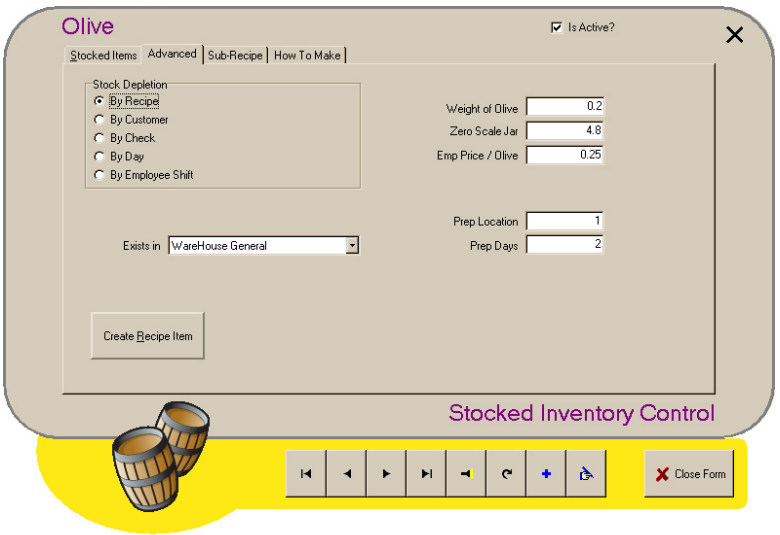
Advanced Tab

Stock Depletion

Check one of the selections to indicate how the stock item is to deplete inventory.

- By Recipe - depletes by recipe. For example, anything food and beverage would be applied here.
- By Customer - depletes by the number of customer. For example, breath mints or toothpics.
- By Check - depletes by check. For example, promotional items.
- By Day - depletes by day. For example, newspapers laid out for customer to read.
- By Employee Shift - depletes by shift. For example, hair nets and rubber gloves.

Note: Selection of customer, check, day or shift will display a quantity field.



Liquor Weighing

It is easy to take inventory of a bar if you are only counting full bottles. But counting opened bottles requires more work. If you know the weight of 1 ounce of the liquid and the weight of the empty bottle, you can calculate how many ounces are in the bottle by weighing it. The following three fields are used for such calculations.

- Weight Of Ounce - represents the weight of one ounce of the liquor.
- Zero Scale Of Bottle - represents the tare weight of the bottle.
- Emp Price/Ounce - represents the price charged to employees for spillage.

This information is reflected in related reports available through both Report Viewer and DataMiner.

Exists In

If working with multiple warehouses, you can define which warehouse this stock item will be applied to.

Create Recipe Item

This is only required for stock items that may require manual adjustments. In applying this button, you are creating a Product called '99=stock item' (the words stock item being replaced with the appropriate description). This product will then show up when using [Post Inventory Usage] located in the Function Menu. This allows you to filter stock items so that only applicable items will show up in the Post Inventory Usage list. Use of [Create Recipe Item] is not required for items to be applied to recipe tabs.

Prep Location

This field is primarily for catering-related situations. It allows you to link the item to a food preparation station. You can link Stock items, Sub-Recipe items and Product items to prep locations. Each prep location is assigned a number which is entered here.

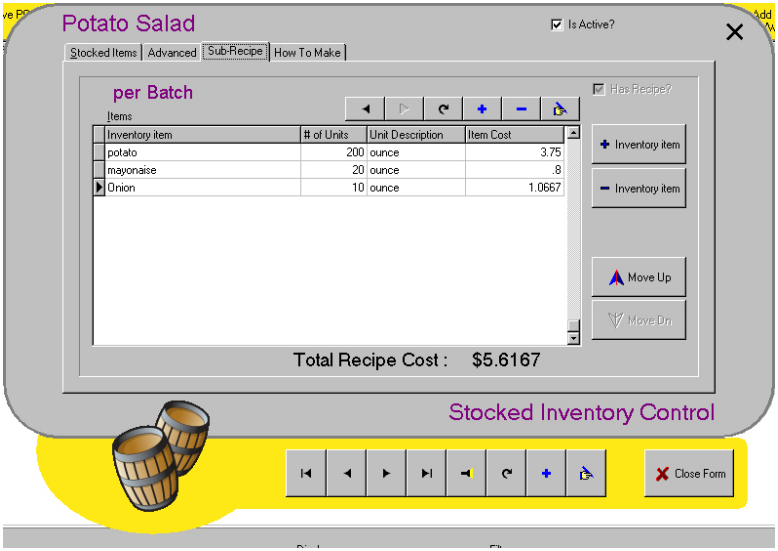
Prep Days

This identifies the preparation days required for the item. For example, you have a stock item of Chicken meat. The prep days for chicken may be 2 days, which is the time required to thaw the frozen meat. If used in Chicken Salad, then it may be another day to cook the meat and process with other ingredients to make the sub-recipe item of Chicken Salad. Then you may have an order of Luncheon Special which includes a scoop of that Chicken Salad. The prep days for that may also be a day.

In defining this information, you may see for example that you have an order of Luncheon Specials for several days from now. So the system would report that you need to pull out the chicken now to have ready for that order.

Sub-Recipe Tab

A sub-recipe (or nested recipe) is a recipe within a stock item. For example, the establishment makes potato salad and includes this as a recipe item within many of its products. A new tab called Sub-Recipe has been added to the stock item screen to allow you to apply this.



The application of the sub-recipe is by the Package description (being in this case, Batch). The Batch of potato salad would be broken down into several Bowls or Jars and the unit description would be in Ounce (being the measurement applied to the related product recipes). The image above shows the recipe for a batch of Potato Salad. To apply a sub-recipe to a stock item, check the 'Has Recipe' box. You can change the order of recipe items using the Move Up and Down arrow buttons.

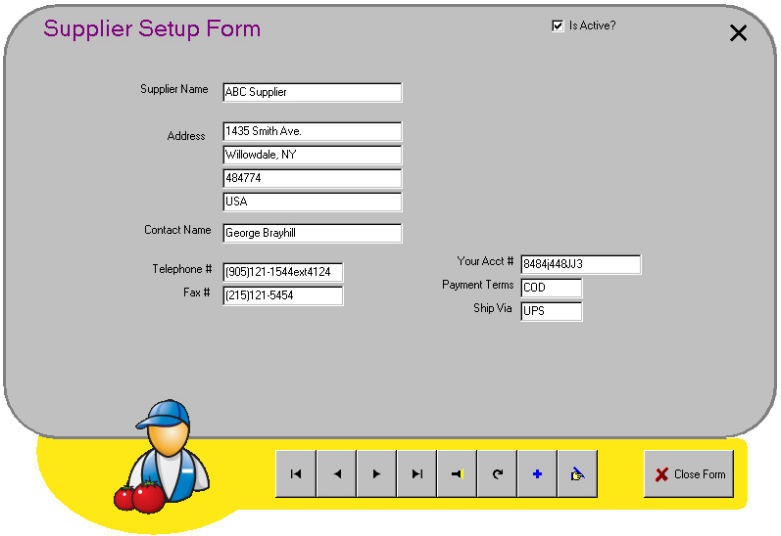
How To Make Tab

You can now apply item information to stock items. This is primarily intended for items with sub-recipes. For example, if someone asks what ingredients go into the potato salad, you can apply either the 'How To Make' function or 'Item Information' function to the product with a sub-recipe.

Supplier Setup

Inventory / Supplier Setup

Use this function to apply stock suppliers to the system. The default supplier record called ABC Supplier can be set as inactive by un-checking the [Is Active] box located in the top right corner of the screen.



Your Acct

If you have an account set up with the supplier, enter the account number here. The information on this screen will be reflected in your Purchase Orders.

Payment Terms

Indicate the terms of payment agreed with the supplier.

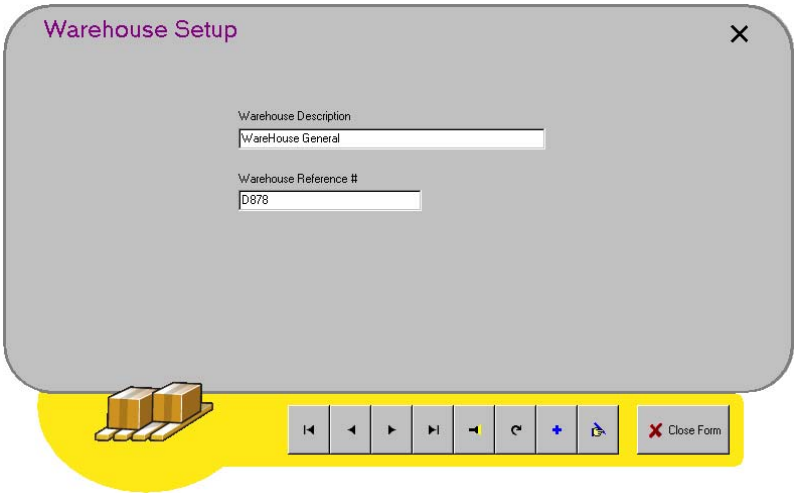
Ship Via

Indicate the method of shipping.

Warehouse Setup

Inventory / Warehouse Setup

A warehouse can be anything from a walk-in refrigerator to a cupboard behind a counter. Use this for to apply the warehouse(s) to the system. Warehouses are applied to Station Setup.



Warehouse Reference

Used for reporting purposes, this allows management to relate inventory items to an accounting system or to invoices and documents pertaining to that warehouse and its items.

Station Depletion By Warehouse

When you apply a station to a warehouse, it will deplete ordered inventory from that warehouse. For example, Station 2 is assigned to a bar warehouse. This warehouse could be just a refrigerator unit behind the bar. As beverages are ordered from the station, they deplete from the stock in that warehouse.

However, if food were ordered from Station 2, the bar's warehouse may not contain any food stock items. The system will record the depletion nonetheless showing a negative stock level. The warehouse containing the actual stock item will not deplete showing it as being over by that quantity. When it comes times to perform a physical count of inventories, the Variance By Warehouse report will show overages and shortages identifying what happened to the stock.

Inventory Manager

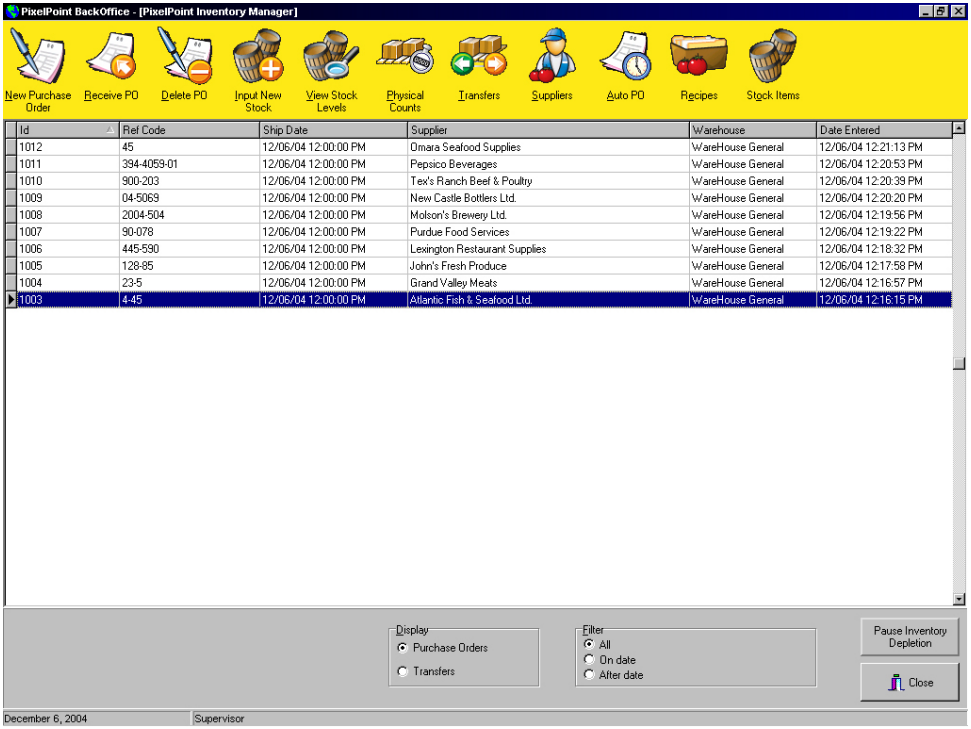
Inventory Manager

Inventory / Inventory Manager

The Inventory Manager system integrates the various functions for managing inventory. You can create and process purchase orders, add and update stock levels and transfer stock between warehouses.

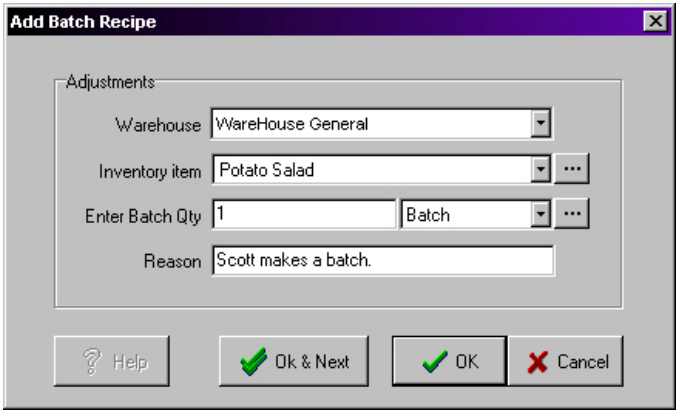
Icon Summary

- New Purchase Order - Create a purchase order. You can either save the PO or apply the stock immediately.
- Receive PO - Receive a purchase order. Processes the delivery of goods, closing off the PO and applying stock.
- Delete PO - If a purchase order is cancelled, this will remove the PO from the system.
- Input New Stock - Used for applying stock immediately. Can also be used for creating purchase orders.
- View Stock Levels - Allows you to view stock levels in any warehouse. It will point out stock levels that are low.
- Physical Counts - Displays stock levels and allows you to adjust those levels.
- Transfers - Transfer inventory from one warehouse to another warehouse.
- Suppliers - Set up your supplier records. Performs the same function available in Inventory / Supplier Setup.
- Auto PO - Based on stock levels and usage, this function will automatically create a purchase order for you.
- Recipes - Set up recipes for products. Performs the same function available in Products / Product Setup.
- Stock Items - Create stock items. Performs the same function available in Inventory / Stocked Items.
- Add Batch Recipe - This allows you to process sub-recipe batches.
- Add Spillage/Waste - This allows you to process inventory spillage and waste.


PixelPoint BackOffice - [PixelPoint Inventory Manager]
New Purchase Order
Receive PO
Delete PO
Input New Stock
View Stock Levels
Physical Counts
Transfers
Suppliers
Auto PO
Recipes
Stock Items
Id | Ref Code | Ship Date | Supplier | Warehouse | Date Entered
1012 | 45 | 12/06/04 12:00:00 PM | Omara Seafood Supplies | WareHouse General | 12/06/04 12:21:13 PM
1011 | 394-4059-01 | 12/06/04 12:00:00 PM | Pepsico Beverages | WareHouse General | 12/06/04 12:20:53 PM
1010 | 900-203 | 12/06/04 12:00:00 PM | Tex's Ranch Beef & Poultry | WareHouse General | 12/06/04 12:20:39 PM
1009 | 04-5069 | 12/06/04 12:00:00 PM | New Castle Bottlers Ltd. | WareHouse General | 12/06/04 12:20:20 PM
1008 | 2004-504 | 12/06/04 12:00:00 PM | Molson's Brewery Ltd. | WareHouse General | 12/06/04 12:19:56 PM
1007 | 90-078 | 12/06/04 12:00:00 PM | Purdue Food Services | WareHouse General | 12/06/04 12:19:22 PM
1006 | 445-590 | 12/06/04 12:00:00 PM | Lexington Restaurant Supplies | WareHouse General | 12/06/04 12:18:32 PM
1005 | 128-85 | 12/06/04 12:00:00 PM | John's Fresh Produce | WareHouse General | 12/06/04 12:17:58 PM
1004 | 23-5 | 12/06/04 12:00:00 PM | Grand Valley Meats | WareHouse General | 12/06/04 12:16:57 PM
1003 | 4-45 | 12/06/04 12:00:00 PM | Atlantic Fish & Seafood Ltd. | WareHouse General | 12/06/04 12:16:15 PM
Display
Purchase Orders
Transfers
Filter
All
On date
After date
Pause Inventory Depletion
Close
December 6, 2004
Supervisor

Add Batch Recipe

This new function simplifies the application of a batch recipe (an item containing a sub-recipe) to inventory.
Upon performing this function, Inventory Manager will deplete inventory by the raw ingredients and apply the processed inventory to stock all in one easy step. This function will only apply to inventory items containing a sub-recipe. Though this example shows Batch (being the Package description) you can also apply it in Unit or Container levels.



Add Spillage/Waste

This function allows you to apply spillage/waste adjustments to inventory in one easy step. The Inventory Item field will allow you to choose from any stock item on file. Though this example shows bun (being Unit), you can also apply it in Container and Package levels.

Display

Located at the bottom of the Inventory Manager screen, select one of the two check boxes to change the main screen display. You can sort the contents by clicking on the title bar of the column to be sorted.

- Purchase Orders - Will display all open purchase orders.
- Transfers - Will display all outstanding warehouse transfers.

The yellow icon bar across the top is customizable just like icon bar in BackOffice. Simply right-click on the yellow area and select Customize. Click and drag icons between the icon window and the icon bar to add and remove them from the screen display. The various applications are also accessible from pull-down menus listed above the icon bar.

Filter

This will filter the current display.

- All - Show all records.
- On Date - Show all purchase orders / transfers set to take place on a certain date.
- After Date - Show all purchase orders / transfers set to take place after a certain date.

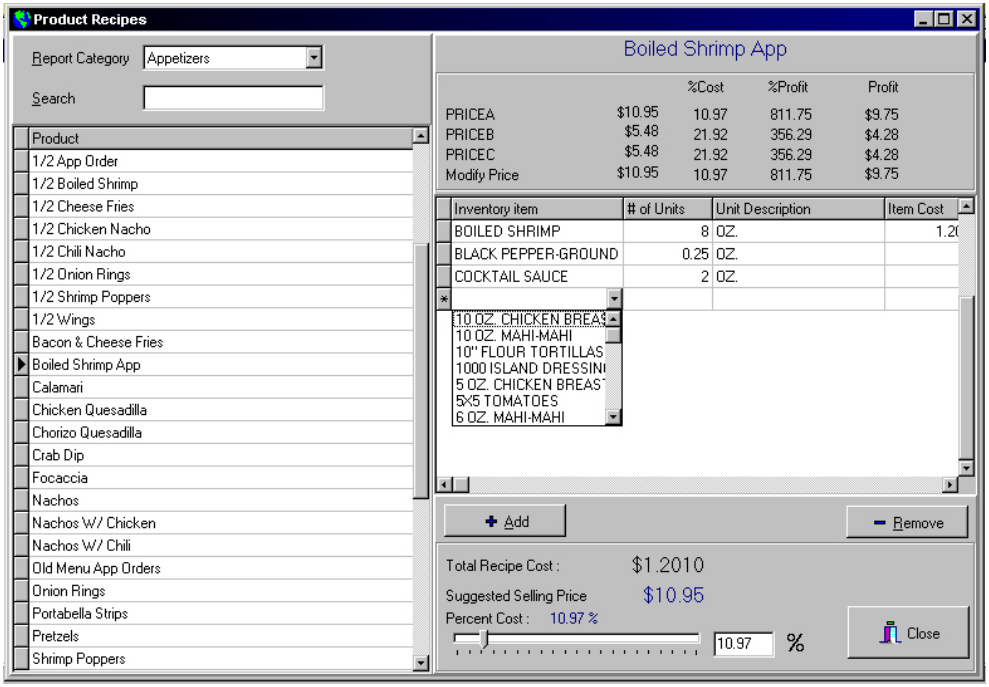
Pause Inventory Depletion

This will temporarily suspend stock depletion allowing the physical count to be entered while the system continues to operate.

Setup Recipes

This method of setting up recipes is similar to the BackOffice method (Product / Recipe Tab) except that the emphasis is placed on the recipe rather than the product it is being applied to.

Filtering by Report Category, you can then select the specific product. Upon selecting one, the product's description is displayed across the top along with all of its price levels. The pull down arrow within the Inventory Item field will show all stock items listed under the selected report category. As you apply items to the recipe, the system will calculate your cost and profit margin automatically. To add in another item, click on [+ Add]. Down at the bottom is a slide that will aid you in determining a selling price. So for example, let's say you have the entire recipe put in and you want the cost of the product to equal 25% of the selling price, you simply move the slide to 25% and the system will tell you what price you should charge for the item.



Suppliers

This is the same screen and function as presented in the Supplier Setup section.

Stock Items

This is the same screen and function as presented in the Stocked Items section.

Purchase Orders

New Purchase Order

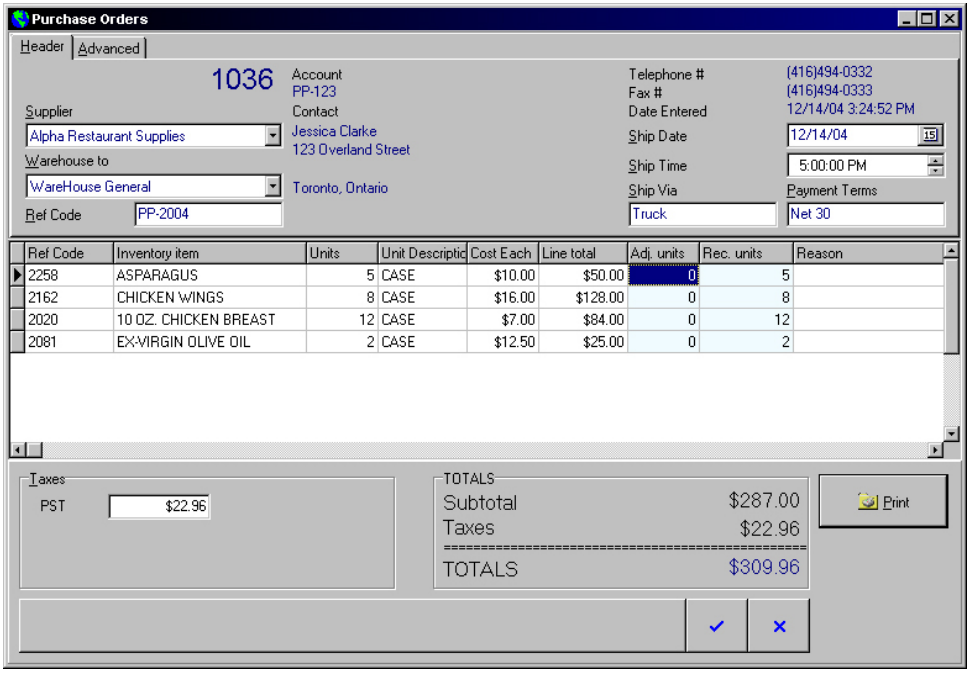
Upon selecting [New Purchase Order], you are prompted to select a supplier from the pull down menu field. Upon selecting one, the supplier information will display to the right. You can set the shipping date, time, method and payment term.

Next you will be prompted to select the warehouse to which the order will be applied. If it is a mixture of items (such as food and beverage), then select Warehouse General and the order will be separated and allocated upon delivery using the Warehouse Transfer function.

The reference code number is for reporting purposes. You can enter any alphanumeric code in here to reference this order.

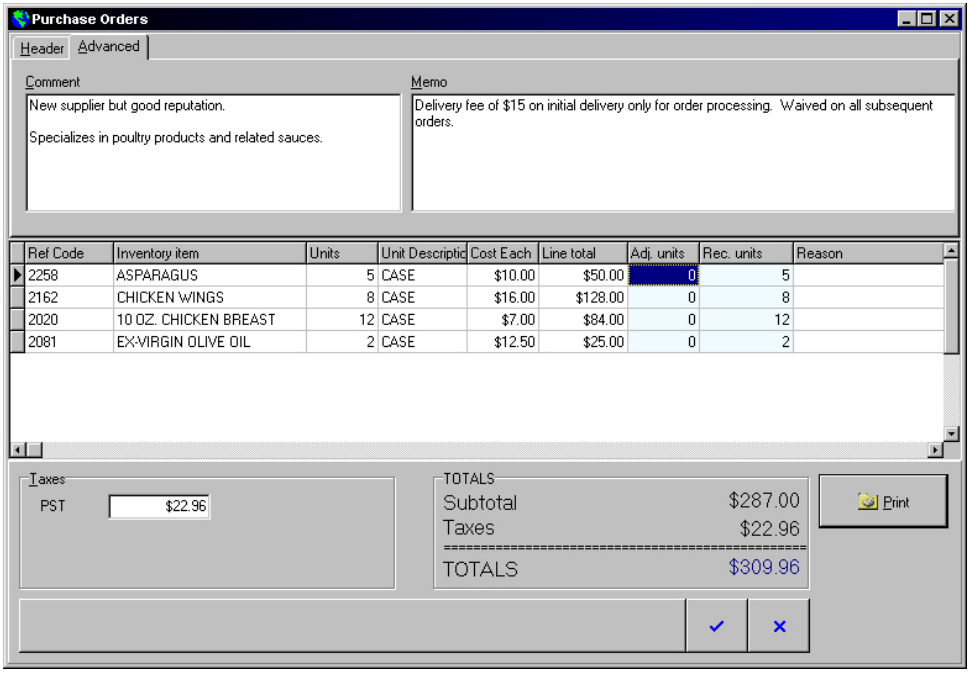
The main body of the purchase order contains these fields:

- **Ref Code** - This is the reference code for the stock item. This will retrieve and apply the stock item to the purchase order. If you do not know the reference code, press the F11 function key or click once on the field to display the lookup button within the field. Either method will retrieve a list of all items available from that supplier. In the event the item has not been ordered from this supplier before, select the supplier field and choose [All Suppliers] to retrieve the complete list of stock items. Double-click on the desired item to enter it into the PO.
- **Inventory Item** - This is the description of the stock item. It will display automatically upon selecting the desired reference code.
- **Units** - Specifies the quantity of items being ordered.
- **Unit Description** - This defaults to the *package* description. However, you can change this to either the *container* or *unit* description by double-clicking the field.
- **Cost Each** - Enter the price for one unit (be it a *package, container* or stock *unit*). Double-click on this field to view an order history of this item from all suppliers.
- **Line Total** - Will automatically calculate Units x Cost Each.
- **Adj Units / Rec Units** - In the event the received order is incomplete, these fields allow you to apply the adjustments to the purchase order. For example, if a case of Chicken Breasts was damaged, you could enter either a -1 in the Adjusted Units field or change the Received Units field to 4. Changing one field will automatically apply the appropriate change to the other.
- **Reason** - Enter a brief description of the incomplete shipment, such as Damaged or Back Ordered.



Press the down arrow on your keyboard to apply another item to the purchase order.

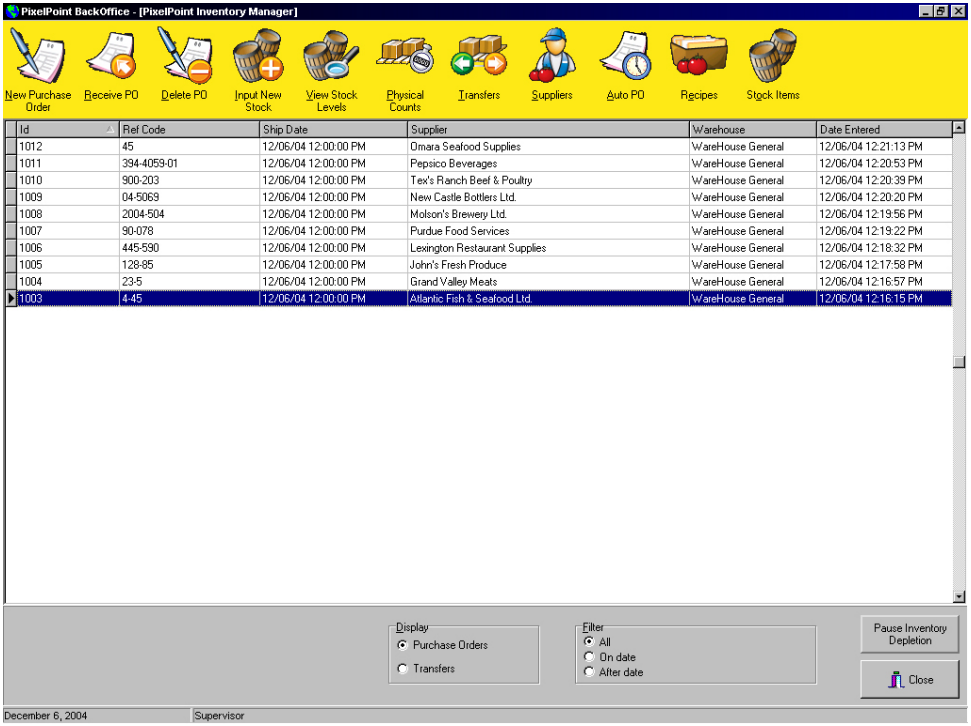
- **Taxes** - Fields for each tax will display in the lower left corner. You can apply the taxes before or after the order has been received
- **Print** - This will print the purchase order.



You can also specify the unit price under the field Cost Each. If you press F11 on this field (or select the expansion button within the field), it will bring up an order history of this item ordered. You can sort the display by supplier, cost and price per unit and filter your history by different quantity types. This will help when negotiating your cost price. If the shipment was incomplete, you can indicate them as a –1 in the Adjustment field or 9 (out of ten) Units Received. To enter in another record, simply press the down arrow key. Down at the bottom of the screen, you can apply all applicable taxes. They are for reporting purposes only and will not affect your product's cost/unit or average cost/unit. It will however, be calculated to your purchase order total. Upon selecting the check mark to save, it will ask if you want to process this order into inventory immediately. If you answer YES, it will update your inventory levels immediately. If you answer NO, it will assume that the PO has not arrived yet and will retain the PO on the system until the shipment does come in.

Receive PO

A shipment has just arrived. You now need to process the order. Begin by selecting the corresponding purchase order from the main screen (see below), then select [Receive PO].


PixelPoint BackOffice - [PixelPoint Inventory Manager]
New Purchase Order
Receive PO
Delete PO
Input New Stock
View Stock Levels
Physical Counts
Transfers
Suppliers
Auto PO
Recipes
Stock Items
Id
Ref Code
Ship Date
Supplier
Warehouse
Date Entered
1012 45 12/06/04 12:00:00 PM Omara Seafood Supplies WareHouse General 12/06/04 12:21:13 PM
1011 394-4059-01 12/06/04 12:00:00 PM Pepsico Beverages WareHouse General 12/06/04 12:20:53 PM
1010 900-203 12/06/04 12:00:00 PM Tex's Ranch Beef & Poultry WareHouse General 12/06/04 12:20:39 PM
1009 04-5069 12/06/04 12:00:00 PM New Castle Bottlers Ltd. WareHouse General 12/06/04 12:20:20 PM
1008 2004-504 12/06/04 12:00:00 PM Molson's Brewery Ltd. WareHouse General 12/06/04 12:19:56 PM
1007 90-078 12/06/04 12:00:00 PM Purdue Food Services WareHouse General 12/06/04 12:19:22 PM
1006 445-590 12/06/04 12:00:00 PM Lexington Restaurant Supplies WareHouse General 12/06/04 12:18:32 PM
1005 128-85 12/06/04 12:00:00 PM John's Fresh Produce WareHouse General 12/06/04 12:17:58 PM
1004 23-5 12/06/04 12:00:00 PM Grand Valley Meats WareHouse General 12/06/04 12:16:57 PM
1003 4-45 12/06/04 12:00:00 PM Atlantic Fish & Seafood Ltd. WareHouse General 12/06/04 12:16:15 PM
Display
Purchase Orders
Transfers
Filter
All
On date
After date
Pause Inventory Depletion
Close
December 6, 2004
Supervisor

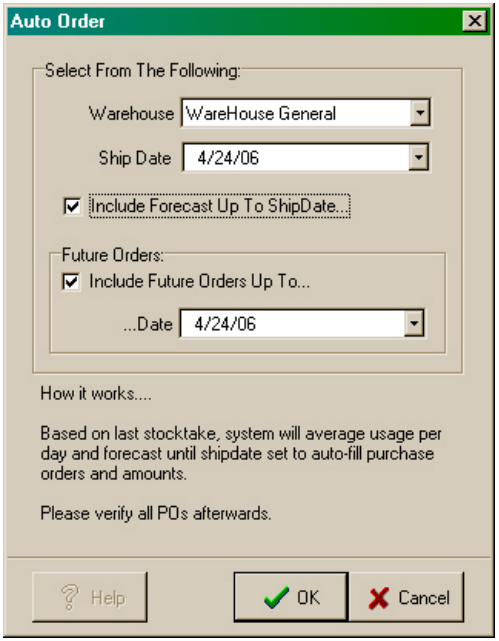
The purchase order will display on the screen. From this point you can enter the received units or adjusted units (if the shipment is incomplete), make additional changes to the contents, and/or re-print the purchase order. Upon selecting the check mark button, the system will ask if you wish to process into inventory. Select [Yes] to add the contents to inventory and clear the PO from the list. Select [No] to accept the changes and not update your inventory levels. The purchase order will be left on the PO list.

Delete PO

This will remove the highlighted purchase order from the PO list without updating inventory.

Auto PO

This function will automatically create purchase orders for you based on stock levels and usage. Identify the warehouse it will apply to and the desired shipping date. A purchase order will be create for each applicable supplier.



The calculation method for creating the Auto PO incorporates the following criteria:

- Historical daily usage
- Projected usage from now up to the shipping date
- Saved future orders from now up to the shipping date

Stock

Input New Stock

Input New Stock functions the same way as the Purchase Order screen except that it is designed to allow you to create and process a purchase order in one step. This function is for adding in the initial inventory or processing shipments in which a purchase order was not initially created, such as a forced order.

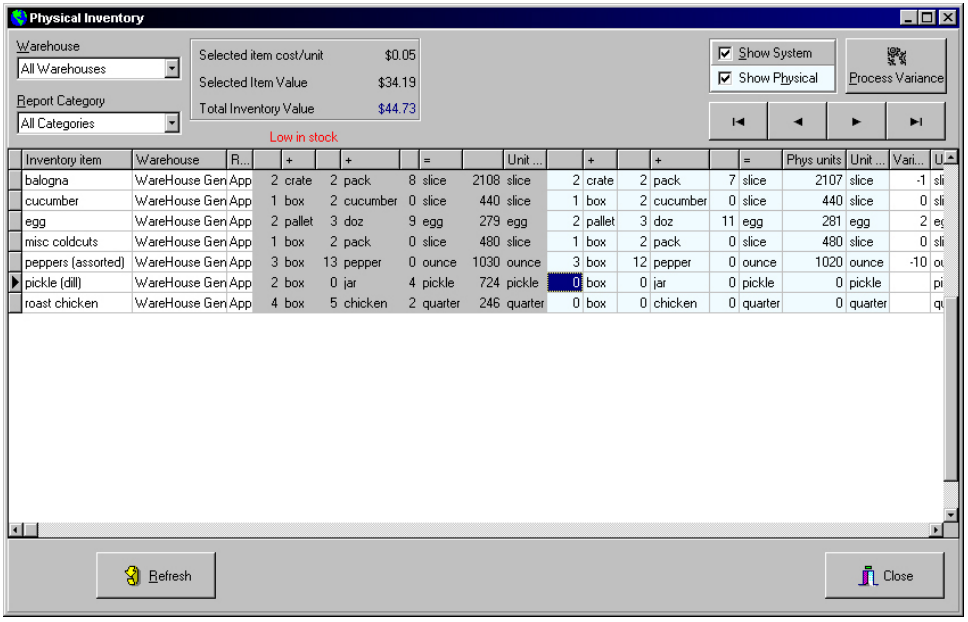
Transfer

The Transfer Screen allows you to record the exchange of inventory items from one warehouse to another. You begin by selecting the source and destination warehouses. Press the F11 function key (or select the expansion button within the field box) to select the item you want to transfer. The system will show it's current stock level. You identify how many you want to transfer and can also offer a reason if you wish. Pressing the [Receive] button, you then process this into inventory in which your levels will be updated immediately.

If you choose to save without receiving, the transfer will show up on the Transfers display and can be activated on-demand by selecting the record and clicking [Receive].

Physical Counts

There is a document in Report Viewer that aids you in conducting a physical count of inventory. You simply fill in the blanks on the sheet, then go into this screen.



Notice that it is sorted exactly the same way as the physical count report. From here, just go through each cell and fill in the numbers written on the sheet. You can also filter this screen

to display items by warehouse. Simply go into the quantities for that item and make the changes.

The variance column automatically calculates the difference in levels between the physical count and what the system calculates as being in stock. You can also click on Show System to see what PixelPoint shows as being in stock. If you do not modify any of the stock item quantities, it will not post any variance to the existing totals. This allows you to take inventory on a selective group of items more frequently than others.

Variances will only be calculated and processed on lines that you have modified. You can leave this information in here indefinitely until you finally select the button Process Variance. At that time, it will post your adjustments. Please note that the adjustments do not affect the average cost per unit. It is simply posted as a direct adjustment.

Arrow buttons now reside at the bottom of the screen.

These will allow you to adjust the sort order of stock items within a warehouse. This order will be carried across to the Stock Count report which is used to perform physical counts of inventory within a warehouse. You can set the order of this display to match the order of stock as they visually appear within the warehouse (such as grouping your steaks together, then your chicken pieces, then the fish and so on). This makes it much easier to perform physical counts when the order of the list matches the order of items residing in the warehouse.

Waste & Spillage

Two functions that can be added to the icon bar are Add Batch Recipe and Add Spillage/Waste. You can add these to the yellow task bar by right-clicking and selecting Customize, just like in BackOffice.

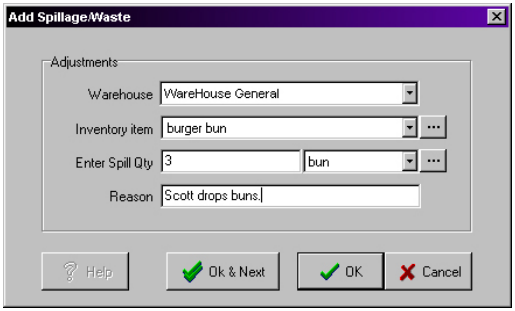
Add Batch Recipe

This new function simplifies the application of a batch recipe (an item containing a sub-recipe) to inventory.

Upon performing this function, Inventory Manager will deplete inventory by the raw ingredients and apply the processed inventory to stock all in one easy step. This function will only apply to inventory items containing a sub-recipe. Though this example shows Batch (being the Package description) you can also apply it in Unit or Container levels.

Add Spillage/Waste

This function allows you to apply spillage/waste adjustments to inventory in one easy step.



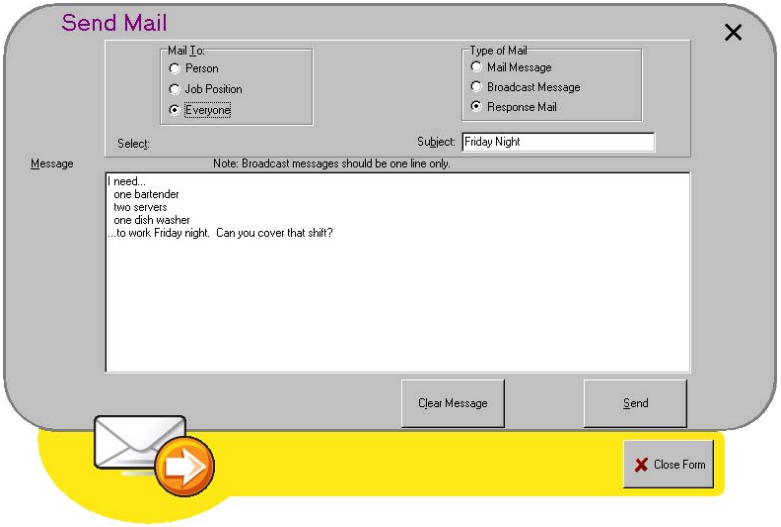
The Inventory Item field will allow you to choose from any stock item on file. Though this example shows bun (being Unit), you can also apply it in Container and Package levels.

Mail

Send Mail

Mail / Send Mail

PixelPoint contains an internal email function that allows management to send messages to staff. These messages can be addressed to a specific person, everyone within a certain job position, or to everyone who uses the system.



Mail To

- Person - Presents a field allowing you to select the person to receive the mail.
- Job Position - Presents a field allowing you to select a job position. All employees with that job position will receive the mail.
- Everyone - Indicates that you wish all PixelPoint users to receive the mail.

Type Of Mail

- Mail Message - This type of message is usually reserved for longer messages that contain substantial and detailed information.
- Broadcast Message - This type of message can be used to deliver a short, one line message.
- Response Mail - This type of message is used whenever management would like to ask a question to the recipient(s) and receive a Yes or No answer. When applying this type of mail, a unique message title must be applied. The title is used to record the answers and allow you to retrieve them later.

Clear Message

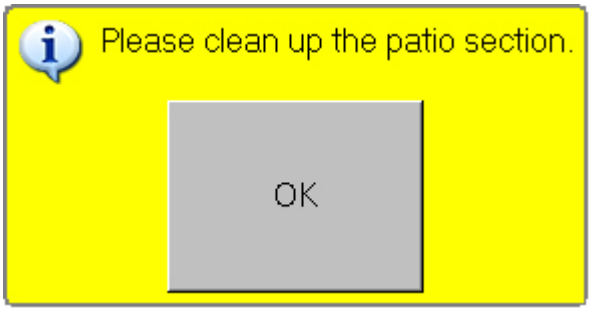
This button will clear the entire message area so you can retype the message.

Send

This button will send your message to the designated person or people.

Broadcast Message

A broadcast message is a quick, one line message. It appears as shown below.

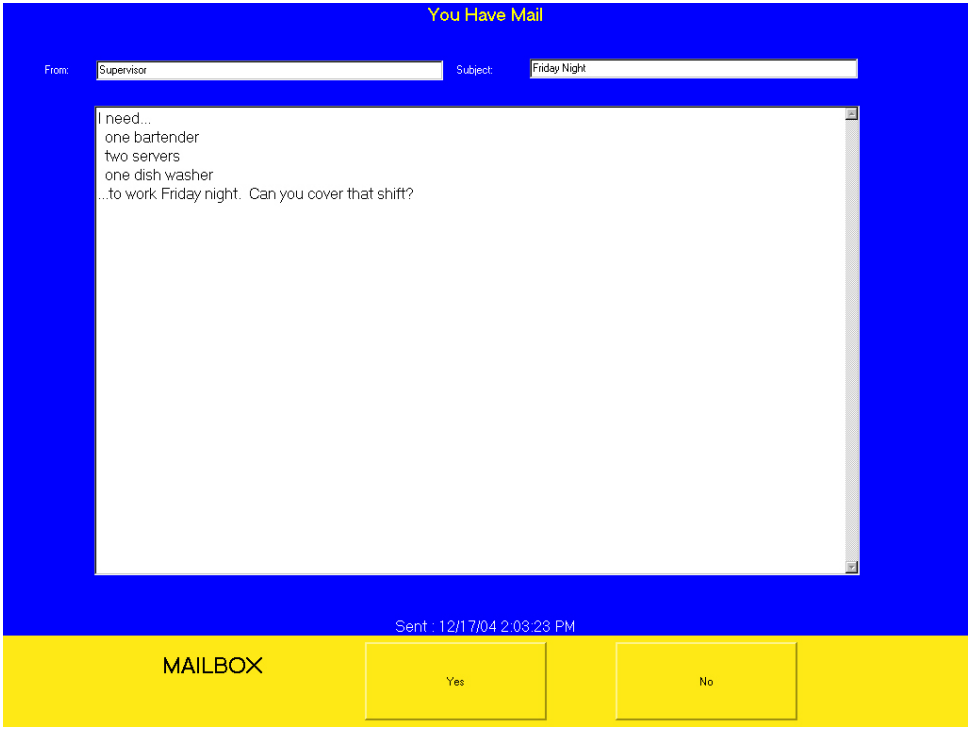


Response Mail

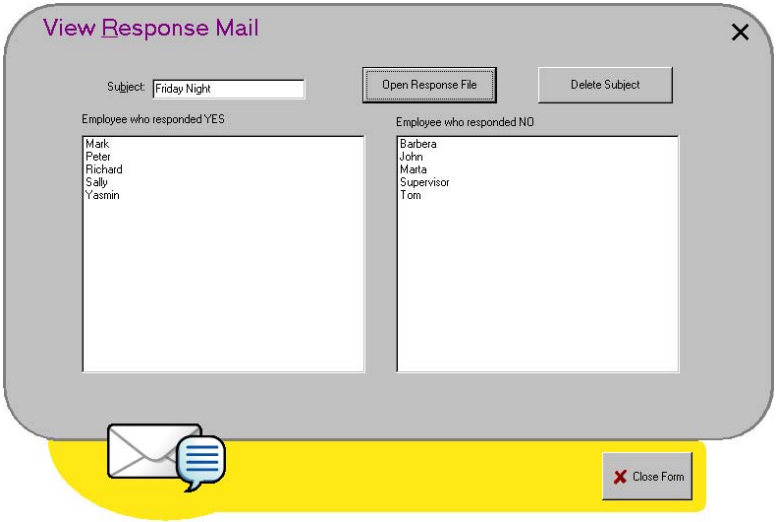
Mail / View Response Mail

Once mail has been sent, the message will be received immediately by anyone currently logged into the system. Regardless of what screen they are currently on, the message will override it, appearing on the screen. If the recipient is not currently logged into the system, the message will appear once they log in.

If either a Mail Message or Response Mail were sent, a message much like the one below will appear. However, a Mail Message will offer an [OK] button whereas a Response Mail will offer [Yes] and [No] buttons at the bottom.



Within BackOffice, select Mail / View Response Mail to retrieve the responses to the mail message.



Subject

This displays the name of the Response File currently loaded.

Open Response File

This button allows you to retrieve the desired response file.

Delete Subject

This will remove the currently loaded response file.

Employee Who Responded Yes

Based on the Yes/No choices selected by the recipients, this column shows who responded Yes.

Employee Who Responded No

This column shows who responded No.

BackOffice Administrator

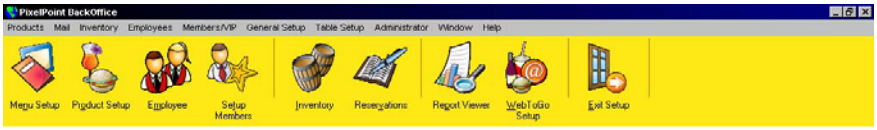
System Concepts

Setup Overview

You can access BackOffice by one of two ways:

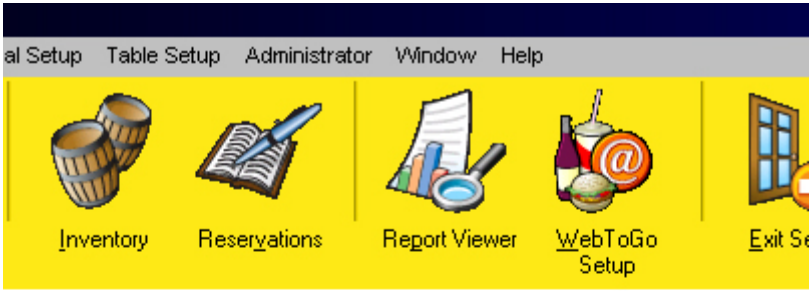
1. From the POS front-end. Select the [Manager] button from the Table Layout screen. Within that menu, select [System Setup].
2. From Windows desktop. Select [Start], [Programs], [PixelPoint POS] and [POS System Setup].

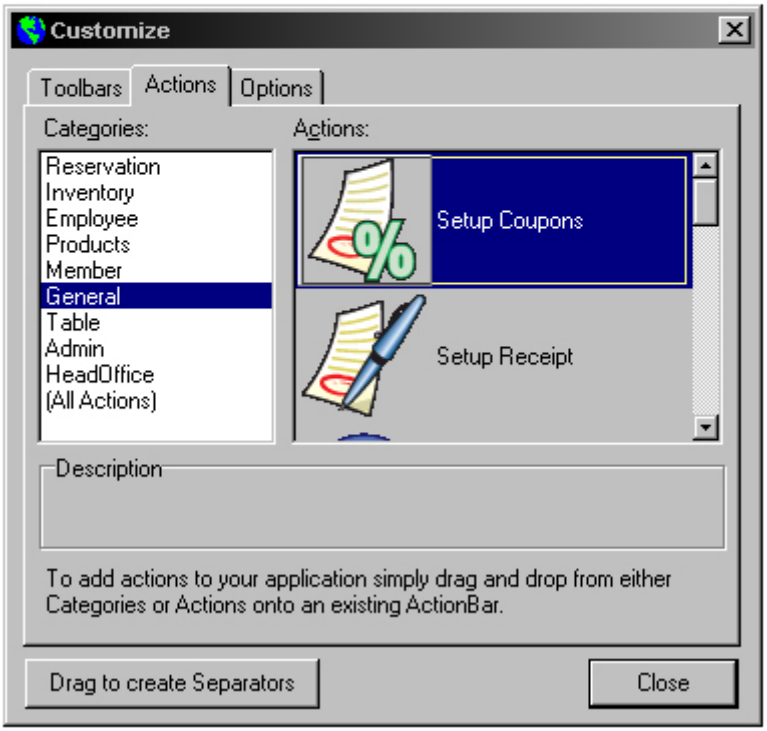
You can also create a Windows desktop shortcut for \\posserver\pixelpos\systemset.exe.



The screen is comprised of two sections. The first is a selection of pull-down menus listed across the top of the screen (see below).

The second is the yellow tool bar which contains shortcut icons to the various programming functions contained in the pull-down menus. You can customize this toolbar by right-clicking on the yellow area.





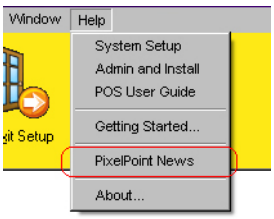
A window will appear. To remove an icon, click and drag it to this window. To add an icon, select it from the Actions window and click and drag it to the tool bar. You can also arrange the tool bar icons by clicking and dragging them to the desired location.

BackOffice News Support

You can receive the latest product news and information directly from PixelPoint. This information will show up in BackOffice. It requires that the server be connected to the Internet.

PixelPoint BackOffice
Products Mail Inventory Employees Members/VIP General Setup Table Setup Administrator Window Help
Menu Setup
Product Setup
Forced Questions
Employee
Inventory
Report Viewer
Exit Setup
PAR PixelPoint.
News Releases
News & Events
Latest News
Corner Bakery Cafe® Selects PAR Technology's PixelPoint Software and Industry Leading Hardware Platform
[More]
Current Releases
10.26.05 PixelPoint Technologies, Inc. Acquired by PAR
08.08.05 PixelPoint to be Acquired by PAR Technology Corporation
07.29.05 Hospitality college Teaching Students about PixelPoint POS
06.06.05 Serious Coffee® Rolls out PixelPoint HeadOffice™
04.06.04 New Partnership Closes the gap between POS and Financial Accounting
03.02.04 Papa Murphy's Franchisee Rollout PixelPoint
02.12.04 Salisbury House successfully completes roll out of PixelPoint's Enterprise POS
Pixel News
PixelPoint POS
Backoffice
March 2, 2006
Supervisor

Pixel News is activated within BackOffice under the Help pull down menu.



This screen offers information such as press releases and news related to new features and functions.

Online Help

Context-sensitive help is available throughout BackOffice. Simply right-click on the screen in question and select Help.

Programming Changes

Displayed across the top of the BackOffice screen is a list of pull-down menus (see below).

When applying programming changes to each of these sections, most updates will apply at the front-end upon going to the login screen. However some of the higher-level settings involving system configuration may require that you restart the PixelPoint POS system, before the change can take place. The general rule for these is as follows: If the change is made under the *Administrator menu,* then you must *restart the POS* for the change to take affect.

For example, adding a new coupon would only require that the front-end user log out. Upon logging back in, the coupon would be present. But if you were to add a station or change a printer's configuration, the system would have to be restarted in order for such changes to take affect.

Order Of Programming

When programming a PixelPoint POS system from scratch, you may find it difficult to know where to start and what is the best sequence of order to follow. Listed below is the recommended path of programming that you should try to follow.

Administrative Set Up

1. Setup System ..... (under Administrator)
2. Setup Printer Channels ..... (under Administrator)
3. Setup Network Printers ..... (under Administrator)
4. Setup Sales Type ..... (under Administrator)
5. Order Templates ..... (under Administrator)
6. Setup Revenue Centers ..... (under Administrator)
7. Multi Menu Setup ..... (under Products)
8. Setup Stations ..... (under Administrator)

Employee Set Up

1. Setup Departments ..... (under Employees)
2. Setup Job Positions ..... (under Employees)
3. Setup Security Levels ..... (under Employees)
4. Setup Employees ..... (under Employees)
5. Employee Performance Points ..... (under Employees)

Miscellaneous Set Up

1. Setup Payment Methods ..... (under Administrator)
2. Pay In/Out Reasons ..... (under General Setup)
3. Refund Reasons ..... (under Products)
4. Setup Receipt ..... (under General Setup)
5. Mealtime Setup ..... (under General Setup)
6. Banner Message ..... (under General Setup)
7. Setup Billboard Message ..... (under General Setup)
8. Setup Table Sections ..... (under Table Setup)
9. Table Settings ..... (under Table Setup)
10. Setup Table Layout ..... (under Table Setup)

Product and Menu Set Up

1. Summary Group Setup ..... (under Products)
2. Report Category Setup ..... (under Products)
3. Order Page Setup ..... (under Products)
4. Forced Questions ..... (under Products)
5. Product Setup ..... (under Products)
6. Menu Setup ..... (under Products)
7. Setup Coupons ..... (under General)

You may find that some of these steps do not need to be programmed for your site. If this is the case, simply continue on to the next step. There are also some applications within BackOffice that are not included in this list (such as web ordering, members and inventory). They are not critical components to the operation of the POS system and can optionally be programmed any time after completion of the basic system.

Navigation Bar

Throughout BackOffice, you will see this navigation bar. It will help guide you to the desired database record and also allow you to add and edit records. The function of each button is as follows:

Move to the first record in the file.

Move to the previous record in the file.

Move to the next record in the file.

Move to the last record in the file.

Search all records. This presents them in a database table format.

Refresh the display.

Add a new record.

Edit the current record.

Leave this function.

Save the change (edit mode).

Cancel the change (edit mode).

Active And Inactive Records

You do not delete database records from the PixelPoint database, you set them as inactive.

In many of the setup screens, you will see this check box located in the upper right corner. If you wish to remove a record (be it an employee, product or whatever), simply retrieve the record, then un-check this box. The record will no longer display.

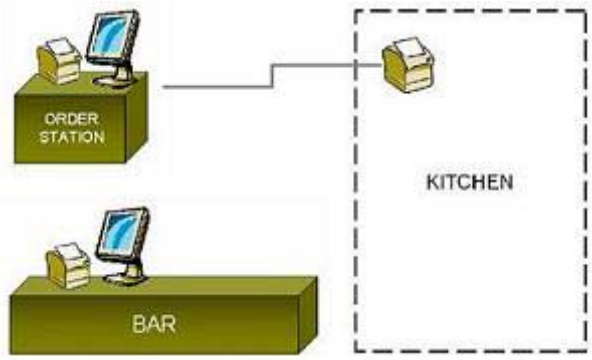
Should you find it necessary to reinstate an inactive record, go into BackOffice and select the [Window] menu.

Un-check [Show Active Records Only]. You will now be able to view and edit inactive records. Check the [Is Active] box to re-activate the record.

Printing Concepts

Naming Printers

In the example below, the establishment has two stations and three printers. The POS unit at the order station is Station 1. The POS unit at the bar is Station 2. The printer in the kitchen is connected to Station 1.



It is recommended that you name printers by their primary function followed by the station number they are connected to. In this case, the primary function of the printer at the order station is transaction-oriented printing (such as receipts, charge slips, cash out reports). Printing of this nature is localized to the station, so we refer to its primary function as being Local printing. Therefore the name of this printer is **LOCAL1** (Local being the primary function and 1 being the number of the station it is connected to).

Similarly, the printer at the bar performs local printing for Station 2. However, it may also serve a secondary purpose in that beverage orders from Station 1 may print here as well. This is referred to as remote printing in that it is performed on a printer that is not local to the station that initiated the print. In this case, the primary function will not be local printing but bar printing. So we call this one **BAR2** (Bar being the primary function and 2 being the station it is connected to).

Following this same theory, the printer in the kitchen generates the kitchen (or food) orders. It is also connected to Station 1, therefore we name it **KITCHEN1** (or Food1).

What Is A Printer Channel

A printer channel is a pre-defined path an item will take when it is being printed. Think of it like a highway in which you have lanes for specific types of vehicles (such as one for food trucks and one for beverage trucks). While the destinations may vary, the lane (or path) they take is specifically intended for that type of vehicle.

Printer channels work the same way. An order containing food and beverages is sent. The food will take one channel, likely to the kitchen, and the beverages will take another path which would likely be to the bar.

Bear in mind that a channel could have multiple destinations. For example, a Martini is ordered and sent. It will follow the Bar channel, but the establishment may have more than one bar. The destinations are assigned within Station Setup. In this example, if the Martini is ordered from Station 1, it may go to one bar while a Martini ordered from Station 2 may go to another bar. Yet both Martinis would use the same Bar printer channel.

Printer channels isolate which items you want to apply to a specific print job. Referring to the previous example, if I added a printer exclusively for printing dessert orders, then I would need a new printer channel to isolate those dessert items. Or if I had one kitchen printer for hot items and one for cold items, I would need two printer channels to isolate my hot items from my cold items. You assign products to print channels within Report Category Setup.

Determining Printer Channels

You determine the establishment's printing needs. In this example, they are as follows:

- *All slips and receipts print at the station.*
- *All food prints to the kitchen.*
- *All beverages print to the bar.*

From this you formulate the printer channels. The first statement (receipts) refers to printing locally at the station. This encompasses all transaction-oriented printing such as charge slips, cash out reports and receipts. It is important to note that all POS systems will require this local station printing, so your first printer channel should always be **LOCAL**.

The next statement addresses the printing of food orders. They will be done in the kitchen, so your next printer channel is **KITCHEN**.

The last statement addresses the printing of beverage orders. All alcoholic and non-alcoholic beverages will print to the bar, so your final printer channel is **BAR**.

You can program up to nine printer channels (each channel representing one of the nine possible ports you can configure on a station). In most cases you will only require 3-5 channels. You do not have to use them all.

- **Question 1**: If the establishment had two kitchens, each with a printer, would you need a channel for each kitchen? The answer is No. Remember that a printer channel is like a specialized lane of traffic. Regardless of the destination (or number of destinations), you only need the one channel (or lane) to handle the common print traffic, being kitchen orders.

- **Question 2**: If the establishment added a printer specifically for pizza orders, would you need a channel for this? The answer is Yes. Pizza items must now take a different path for the regular kitchen items in order to get to the printer destination specified for pizza items.

- **Question 3**: If a pizza printer was also added to the second kitchen, would you need a channel for this? The answer is No. All pizza items would only require the one channel, regardless of how many destinations they may go to.

- **Question 4**: If the establishment also wanted desserts to print at the pizza printer, would you need a channel for this? The answer is No. The criteria for the channel has simply been expanded to include dessert items. For the sake of efficiency however, it would be a good idea to rename the pizza channel to Pizza & Dessert.

Print Consolidation

A consolidation print is a summary print. It isolates specific items and tells the reader the quantity of that item that exists on the order. For example, a large order prints in the kitchen. It contains appetizers, entrees and desserts. Time is crucial and the chef needs to know what needs to be put on the grill right away. The consolidation print shows up at the bottom of the kitchen print identifying all grill items and the quantities ordered. It does not need to provide information such as desired cooking duration or sauces. That information is provided in the regular order printout. The purpose of the consolidation print is strictly to expedite the preparation of critical items.

Print consolidation is applied to specific printers through Administrator / Setup Network Printers / General Tab and applied to specific items through Products / Product Setup / Product Setup Tab.

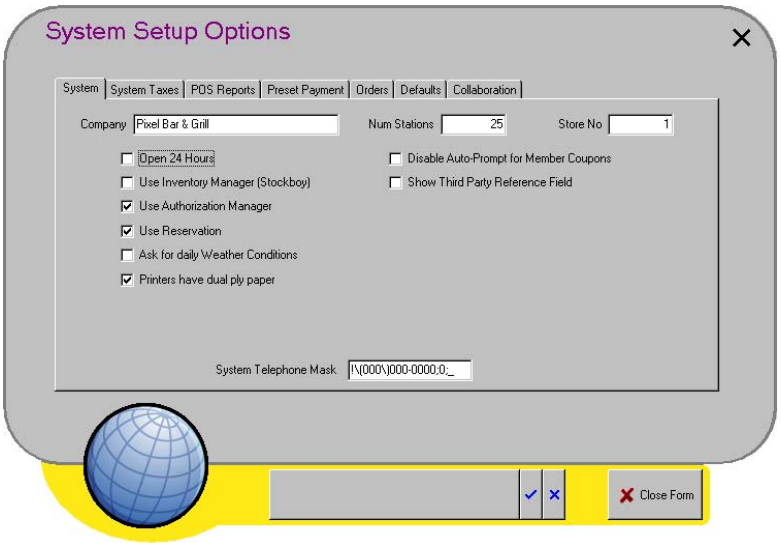
Administrator

Setup System

Setup System

Administrator / Setup System / System

Setup System addresses programming that pertains to the overall operation of the system. The main focus of this tab pertains to opening of interfaces to various PixelPoint modules.



System Tab

Company

Enter the name of the establishment. This field will be used for reporting purposes.

Num Stations

Enter the number of stations used on the system. This number will be used for reporting purposes.

Store No

If the establishment is one of a chain of stores, enter its number here. If this is the only location, enter 1. This number will be used for reporting purposes.

Open 24 Hours

When selected, a window will appear asking for the time to perform End Of Day shutdown. This allows the establishment to perform its 'End of Day' shutdown while it is open for

business. Otherwise, End Of Day shutdown can be performed at any time desired after the establishment has closed.

When running in the 24hour mode the system will allow for going over to the next day with open tables transactions and employees being clocked in.

Use Inventory Manager (StockBoy)

When selected, this indicates to the system that the PixelPoint Inventory Manager Module (StockBoy™) is being used along with the POS Software. Only use this function if you are running StockBoy agent in the background.

Use PixelPoint Authorization Manager

When selected, this indicates to the system that the PixelPoint Authorization Manager Module (CreditCheck™) is being used along with the POS software.

Use Reservation

When selected, this indicates to the system that the PixelPoint Reservation Module (TableTime™) is being used along with the POS software.

Ask For Daily Weather Conditions

When selected, this activates an auto-prompt for the day's weather conditions when End Of Day is run, forcing the addition of weather information into the End Of Day report.

Disable Auto-Prompt For Member Coupons

When a member is eligible for a coupon, the system will prompt you asking if you wish to apply the coupon. Select this field to disable the auto-prompt. The coupon can be retrieved by manually selecting the [Specials] button on the Finish screen.

Show Third Party Reference Field

When selected, this displays hidden fields scattered throughout BackOffice intended to aid in the interfacing of information with third party software. The contents of the Third Party Reference Field can be anything (including spaces and symbols). When you un-check this field, the fields will be hidden once again. However, the contents of those fields will remain intact.

Printers Have Dual Ply Paper

When selected, this sets the system to only print charge slips once, since the paper will generate the second copy. If unchecked, the system will print two copies of each charge slip.

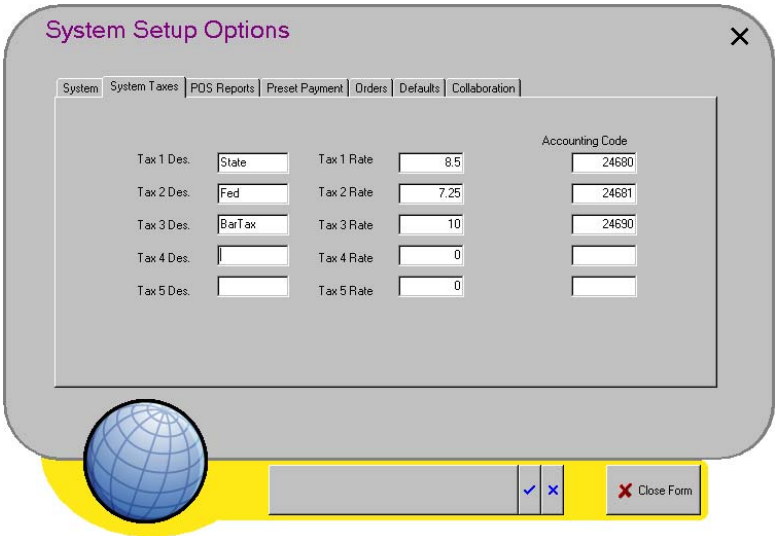
System Telephone Mask

Used for specifying the format for all phone numbers entered in to the system. The default mask is (999)999-9999 which is common to North America and many countries worldwide.

System Taxes Tab

Administrator / Setup System / System Taxes

This tab contains all taxes which could be required within the system. The actual application of these taxes takes place in Report Category Setup and Product Setup. However, it is here that you create each tax and apply its value.



Tax 1 Des.

You can create up to five different taxes. Each tax will contain this description field which may be displayed on the customer receipt.

Tax 1 Rate

This is the rate field which identifies the percent applied for this tax. The number entered here represents the percent (for example, 8 = 8%).

Accounting Code

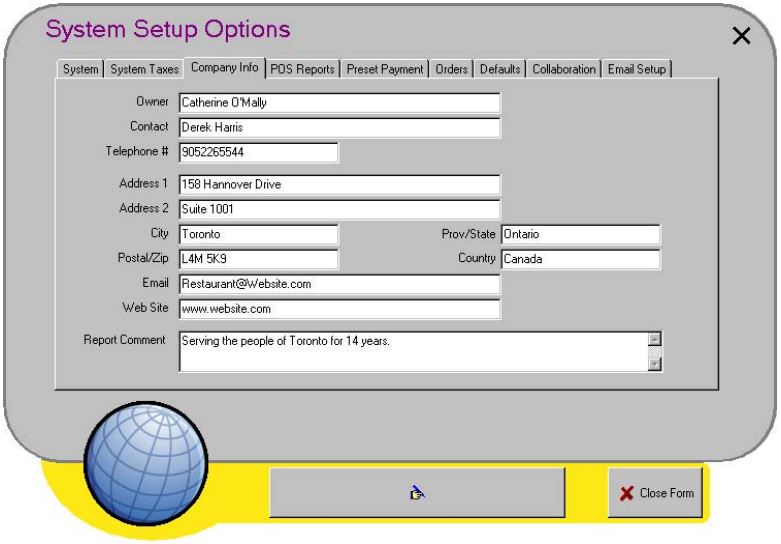
Allows for specifying accounting codes, which can be used with reports and accounting software packages. These are numeric in value and would require custom programming if your particular interface requires an unrecognized format.

Note: If your regional tax laws require functionality beyond what is defined on this screen, this is managed using a custom DLL applied within Pixel32.ini.

Company Info Tab

Administrator / Setup System / Company Info

This tab contains address and contact information pertaining to the establishment.

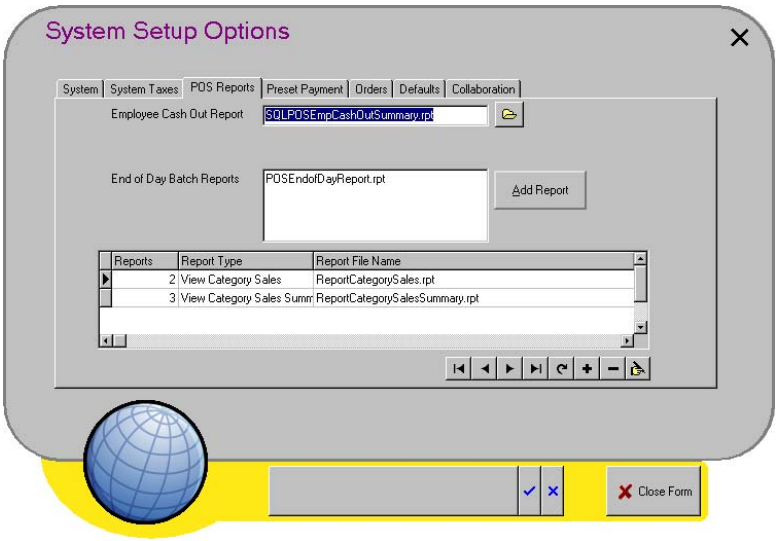


This information is applied in two areas. The first is for member billing so that mailing information is included on the invoice. The second application is in mapping routes for delivery drivers. The driver map application requires a starting point in order to assemble directions to the delivery destination. It pulls that information from here.

POS Reports Tab

Administrator / Setup System / POS Reports

This tab focuses on the application of reports to various front-end operations.



Employee Cash Out Report

This field identifies which report is to be used for cashing out employees. By selecting the folder icon, you may choose different reports to run. If you hold the CTRL key while selecting the report, you may select multiple reports. The default report was specially designed for employee cashouts and it is recommended that you leave it as the report to use.

End of Day Batch Reports

This field identifies which report(s) is to be applied to the End of Day process. If you select the 'Add Reports' button, you may include additional reports for End of Day.

Note: You can only use the 40 column reports for the Employee Cash-Out and End of the Day report. The 40 column reports start with SQLPOS in the file name. However, the browse window for selecting the reports will automatically filter the appropriate reports for you.

Reports Window

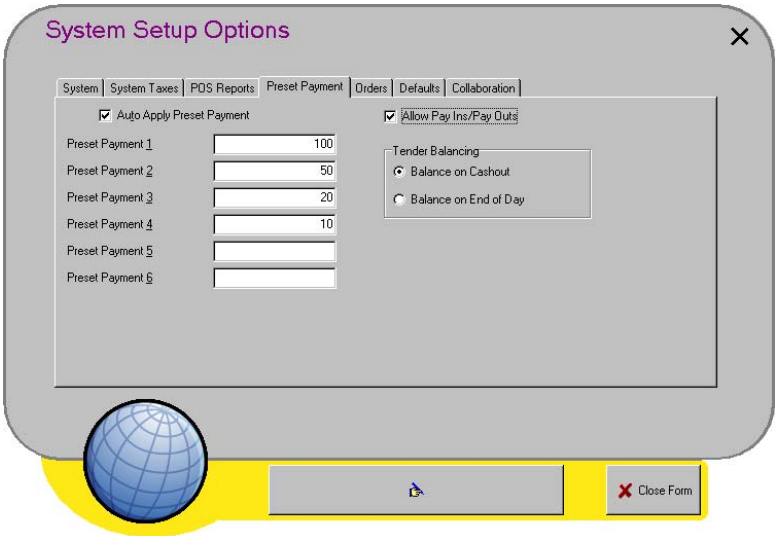
At the front-end, located within the Manager Functions menu, is a Sales Function sub-menu that allows quick viewing of sales-related reports. This window allows you to specify which reports will be available for quick viewing. You can add and remove reports from here. These are 80 column reports.

- **Reports** - Represents the Report Number and should be left as default.
- **ReportType** - Description of the report.
- **Report File Name** - Specifies file name of the report to be loaded.

Preset Payment Tab

Administrator / Setup System / Preset Payment

This tab pertains to the management of money with respect to preset tenders, pay-ins and pay-outs, and tender balancing.



Auto Apply Preset Payment

This field works in conjunction with the preset payment fields. If you select a preset payment button (discussed below), this field will determine how to address it. For example, if checked and you select the 100 button, PixelPoint will assume a $100 cash bill. If unchecked, it will accept $100 but allow you to select the method of payment, such as a foreign currency.

Preset Payment 1

This field represents a fixed value of currency (see below). For example, total of a check is $16.53. The customer gives you a $20 bill. Rather than enter [2] [0] [.] [0] [0] on the keypad, you can simply select the [20] button located on the Finish screen. Upon selecting the method of payment, the system will then calculate and display the appropriate change.

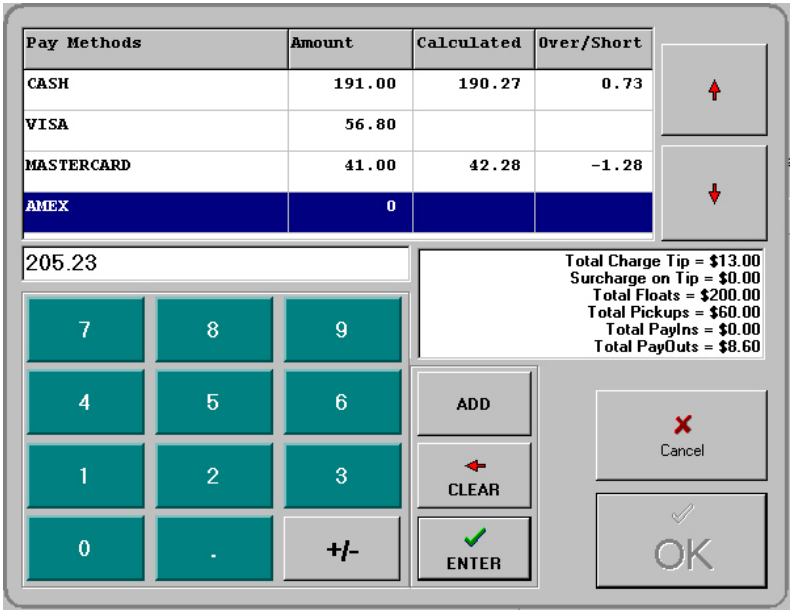
You can apply up to six preset payment values (each representing a currency bill). Upon entering a value, a corresponding button will display on the Finish screen. If left blank, the button will not appear.

Allow Pay Ins/Pay Outs

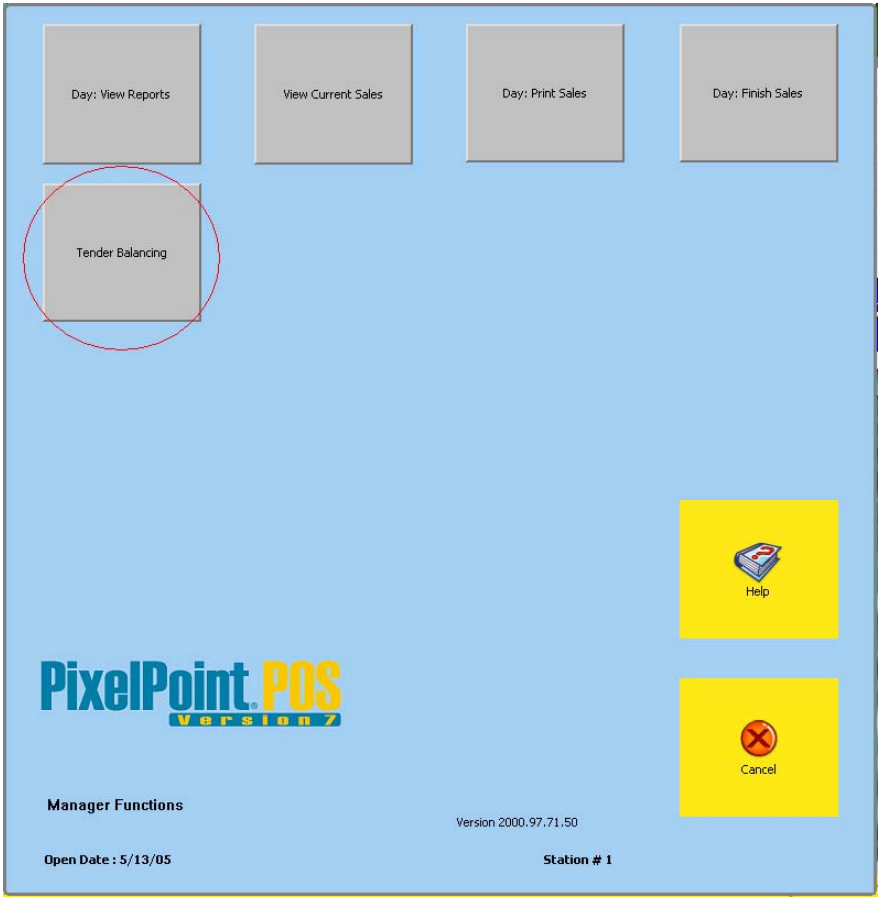
This check box determines whether the POS will allow you to process pay-ins and pay-outs. If checked, the buttons will appear within the Your Settings screen.

Tender Balancing

You can apply tender balancing one of two ways. If you select [Balance On Cashout], the tender balance screen will be incorporated into the Employee Cash Out process. Upon selecting [Cash Out], the tender balance screen will appear (see below) and require the employee to enter their values for each applicable method of payment.



If you select [Balance On End Of Day], the tender balance function will take place as part of the End Of Day process. A [Tender Balance] button will then appear in the Sales Functions sub-menu, next to the [Day: Finish Sales] button (see below). Selecting this will present the Tender Balance screen, however the totals will refer to the entire establishment, not just one employee's totals.

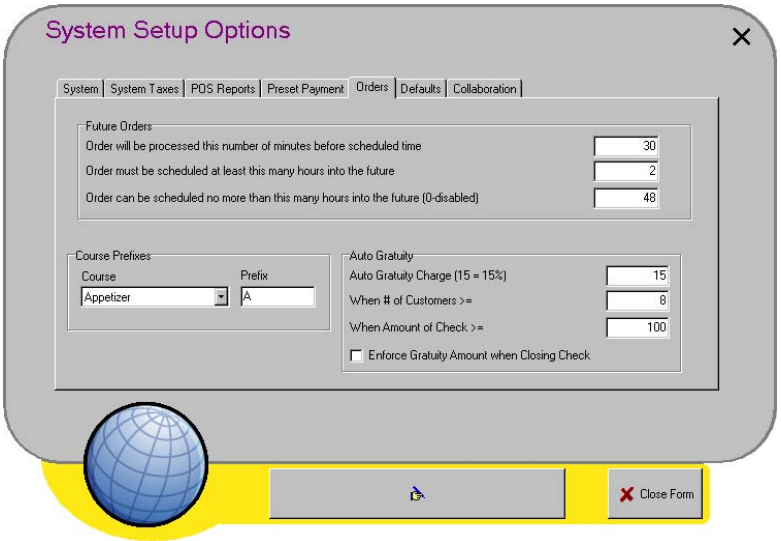


For further information about Tender Balancing, refer to the PixelPoint User's Guide.

Orders Tab

Administrator / Setup System / Orders

The Orders tab addresses three areas: future ordering, line prefixes on kitchen prints and gratuities.



Future Orders

Future ordering is programmed here. Upon entering information into the three fields in this section, the future ordering function will be activated. Future orders can only apply to member transactions. For example, if a call comes in for pick up, the customer can indicate when they would like to pick it up. Future orders can extend beyond the current day without interfering with the End Of Day process.

Order will be processed this number of minutes before scheduled time

This pertains to the lead time you need in order to prepare the order. In the example shown above, the order will print in the kitchen 30 minutes before the scheduled time. For example, an order is to be picked up at 6:00. The order will print in the kitchen at 5:30.

Order must be scheduled at least this many hours into the future

This indicates how short of a lead time you require in to process a future order. In the example shown above, the future order must be at least one hour from now.

Order can be scheduled no more than this many hours into the future

This indicates the maximum number of hours you want to permit a future order to be placed. In the example shown above, you can place a future order up to 24 hours in advance.

Course Prefixes

If applying courses to your ordering process, the prefix applied here will show up on the kitchen print. In the example shown above, every line containing an appetizer will begin with an A. You can also use numbers, symbols and words as the prefix. It is recommended however that you keep the prefix short as printed line space is limited on remote prints.

Auto Gratuity

In this area you program an automatic gratuity that you wish applied to guest checks. The gratuity is a percentage of the net total.

Auto Gratuity Charge

This indicates the size of the tip. In the example shown above, 15 means that the size of gratuity will equal 15% of the net total.

When # of Customers >=

This is one of two criteria settings that dictates when you want the auto gratuity to apply. This field pertains to the number of customers dining at the table. In the sample image, the 15% auto gratuity will be applied when there are 8 or more people seated at the table.

When Amount of Check >=

This is the second of the two criteria settings. This field pertains to the total amount of the guest check. In the sample image, the 15% auto gratuity will be applied when the total amount is equal to or exceeds $100.

Note: The auto gratuity charge will apply when the check matches either of the criteria. If you wish only one criteria to apply, set the other to a high number that is unattainable. For example, if you only want it to apply to the dollar value, set the number of customers to 999.

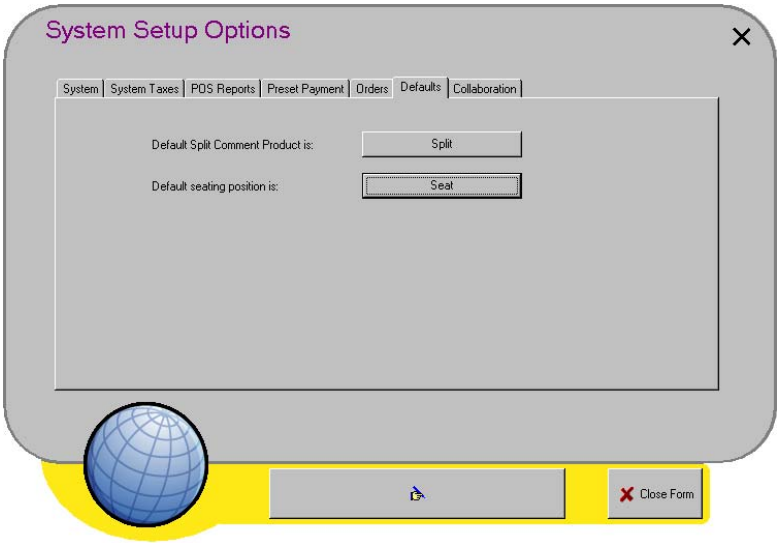
Enforce Gratuity Amount When Closing Check

Some local laws permit an establishment to force the customer to pay the total including gratuity. Some can only offer it as a "suggestion". This field determines which amount displays on the Amount Owing field in the Finish Screen. If checked, the amount will include the Auto Gratuity Charge, meaning the check will not settle for less than the amount including tip. If unchecked, you can close the check for the amount excluding tip.

Defaults Tab

Administrator / Setup System / Defaults

When upgrading your PixelPoint system from a previous version, it may be necessary to adapt some of the internal messages to the new system. The Defaults Tab allows you to do this.



Default Split Comment Product

You order an item that has a forced question applied. You split the forced question only to discover that the remote print does not identify which split each selection applies to. The reason is that the system requires a split command message within the product file.

To apply the Default Split Command Product, do the following:

1. Go into Product Setup
2. Create a product called Split. Type of product is Kitchen Command.
3. Go to the Defaults Tab and select the button for Default Split Command Product. A list of all applicable product items will display.
4. Select the Split product.
5. Your split modifier remote prints will now include split indicators such as *Split 1 of 2, Split 2 of 2* and so on.

Default Seating Position

Similar to the Split Comment Product, you may find similar problems with seating positions on remote prints. Should this be the case, the system requires that you have a seat product applied within here to activate the seating position on remote printing.

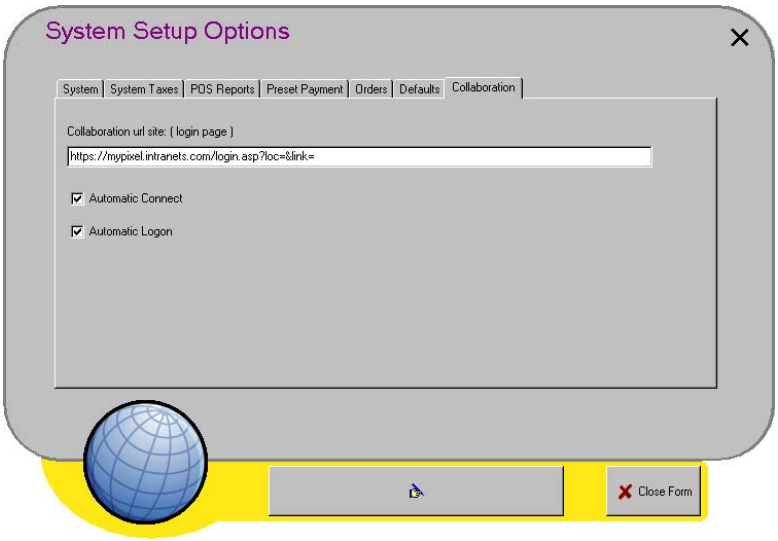
To apply the Default Seating Position, do the following:

1. Go into Product Setup
2. Create a product called Seat. Type of product is Seating Position.
3. Go to the Defaults Tab and select the button for Default Seating Position. A list of all applicable product items will display.
4. Select the Seat product.
5. Your remote prints that use seats will now include identifiers such as *Seat 1, Seat 2* and so on.

Collaboration Tab

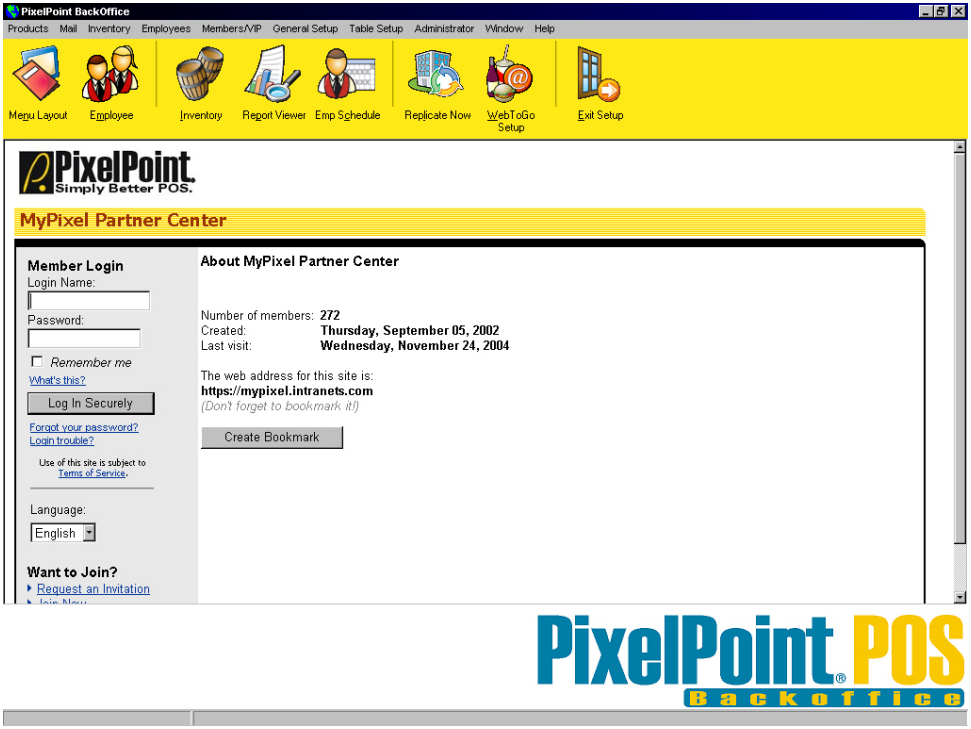
Administrator / Setup System / Collaboration

The collaboration tab allows you to apply Intranet functionality to your PixelPoint system.



When applied within BackOffice, users will be able to log into a corporate intranet site from within the BackOffice screen. From here, managers will be able to manage and share schedules, documents and messages (among many other things), thus allowing them to collaborate on various tasks and projects. To set up an Intranet, do the following:

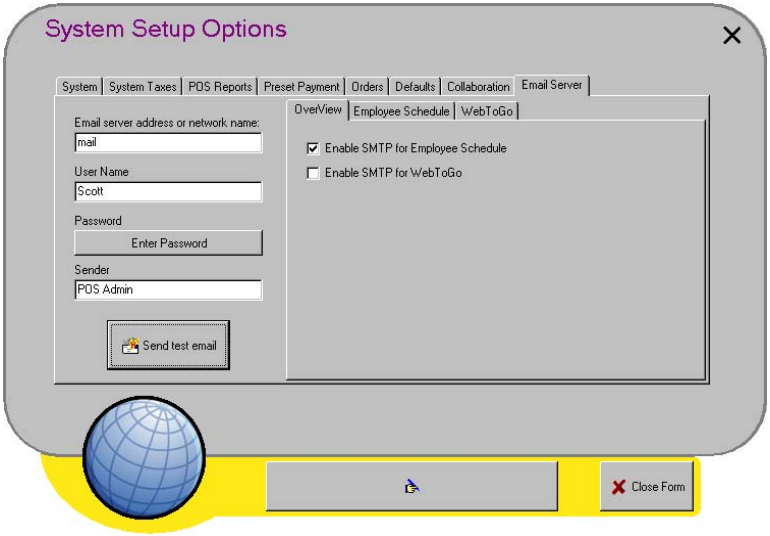
1. Enter the desired intranet URL. The address should be something like clientname.website.com. You could do this by copying and pasting the desired address.
2. Check the [Auto Connect] and [Auto Logon] buttons if desired.
    - Auto Connect will automatically connect you to the intranet site when you go into BackOffice.
    - Auto Logon will automatically log you into the intranet.
3. Within Employee Setup, edit the record of the person you want to have access to the intranet.
4. On the Advanced tab, click the check box for [Web Access].
    - Depending on the intranet service, you may have to ensure the record has an email address.
5. Select [Set Password] and apply one.
6. Log out then back into BackOffice as the employee whose record you just updated.
7. The setup screen may appear similar to this example.



Note: If the server PC has Internet access, you can apply any web site URL to the collaboration field and browse from there. You will not have access, however, to browser functions like [Home], [Back] and an address field. You can also replace the web address with reference to a jpeg file such as c:\image.jpg.

Email Tab

Within here, you configure email through the POS system. There are two sub-tabs; one for employee emailing and one for WebToGo emailing. Make sure you set this up in accordance with your office's mail server settings.



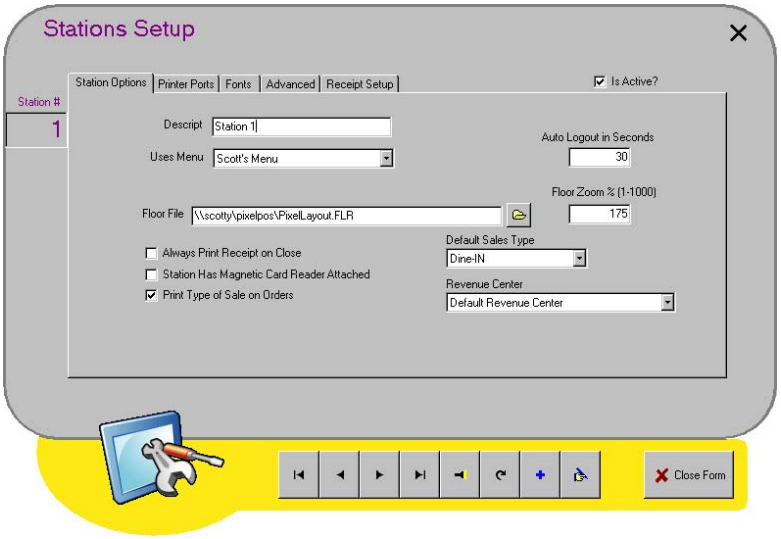
The default settings in subject and body will serve as a template for the email that is sent to the employees regarding their schedule. Refer to the Employee Scheduler section for information regarding how to use it.

Setup Stations

Station Options Tab

Administrator / Setup Stations / Station Options

Setup Stations addresses programming that pertains to each station on the system. The main focus of the station options tab pertains to operational configuration of the station.



Station

Each station is assigned a number. You can move from one station to the other by using the left and right arrow buttons in the navigation bar (shown in the example above). Though 20 stations have been created by default, you are capable of extending additional stations far beyond that. To add another station, select the [+] button in the navigation bar. There is virtually no limit to the number of stations you can create.

Descript

This is the description field for the station. Each station is labelled as Station 1, Station 2 and so on by default. While these descriptions should be sufficient for most any application, you can change them if desired.

Uses Menu

You can program multiple menus into the system (such as a bar menu, a floor menu or menus involving different revenue centers). This field allows you to identify which menu is to work on this particular station. For example, Station 1 uses the Bar Menu. Station 2 uses the Dining Room Menu. The order screens on each would look different and may contain different items simply because each station is using a different menu.

Floor File

You can program multiple table layouts into the system and assign these to the various stations using this field. For example, Station 1 is on the first floor and station 2 is on the second floor. When you log into each station, the table layout screen for each would look different, each representing the dining sections of that station's respective area.

Auto Logout In Seconds

Should a server forget to log out of the station and leave it on the table layout, the next server could accidentally open a new table under the previous user. To help prevent this from happening, you can program the station to automatically log out (if the screen remains untouched) after the number of seconds defined in this field.

Floor Zoom %

The dining areas on the table layout screen can vary greatly in size, depending on the application. A small dining section may only need to cover 10 tables, while a banquet area may entail over 100 tables. In such a cases, you can program the default zoom scale for each station so that a banquet station will be able to display a much wider dining area. The default scale is set to 100. Decreasing the zoom scale will zoom out from the floor area. Increasing the scale will zoom in closer.

Always Print Receipt On Close

This check box sets the receipt to automatically print the receipt when you close the check. If unchecked, the user will have to use the [Print Receipt] button in order to generate the receipt.

Station Has A Magnetic Card Reader Attached

This check box removes the [Manual Login] button from the log in screen. If checked, the [Manual Login] button will disappear making it only possible to access the station using a magnetic swipe card. If unchecked, you can use both manual entry numbers and swipe cards on the station.

Print Type Of Sale On Orders

This check box controls whether you wish the sale type to print on remote prints. For example, it would be important to kitchen staff to know whether the order is dine-in or take-out. That would determine whether they serve it on a plate or in a container. If unchecked, the sale type will not show up on the remote print.

Default Sales Type

If a station is situated at the take-out counter, you would want the default sale type to be take-out. If situated on the dining floor, you would want it set to dine-in. The sale type can be changed using the [Sales Type] button, but the default setting would prevent the server from having to do that every time if most sales of one station are different from another station.

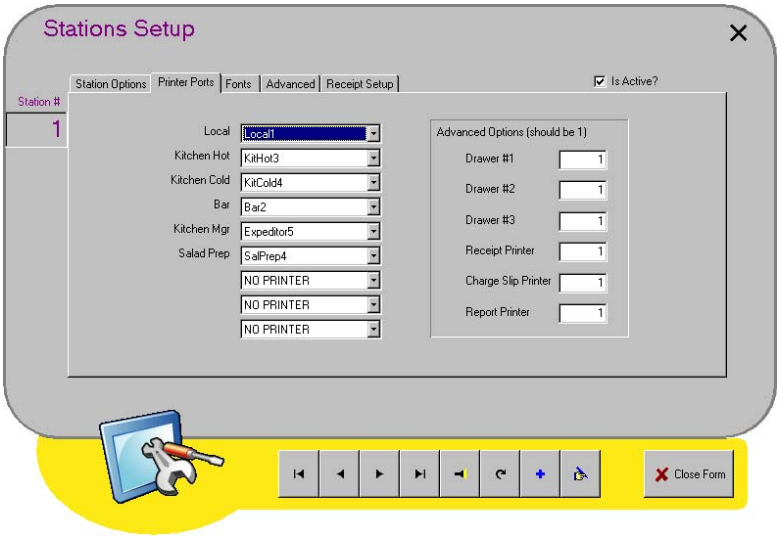
Revenue Center

You can assign stations to specific revenue centers. This can then be reflected in your reports, allowing you to see sales by revenue centers (covering a group of stations) or by individual stations.

Printer Ports Tab

Administrator / Setup Stations / Printer Ports

Having defined your printer channels and programmed all network printers, you now ask yourself, "If I want to print something from this station, where do I want it to print?". It is here that you define those printing destinations.



Local, Kitchen, Bar...

This is the list of the printer channels you have programmed into PixelPoint.

Local1, Expeditor5...

Each field contains a list of all network printers programmed into PixelPoint. Match up the printer channel to the desired printer for the current station. In the example shown above, you will see that Station 1's drink orders will print to the bar printer attached to Station 2 (Bar2). It is important to note that the print requirements for each station may vary. Each station's printing requirements must be treated as unique when you program them.

Advanced Options

Notice that the field next to each title contains a 1. This refers to the first printer channel (being Local). This section allows you to change the settings for local printing.

- **Drawer #x** - You can program up to three cash drawers per station. This setting identifies which printer each drawer will print to when activation of that drawer is required.

- **Receipt Printer** - This setting identifies which printer this station will print receipts to. Referring to the example image, if I were to change this to a 6, then whenever I print a receipt from Station 1, the receipt would print at the printer programmed to channel #6, being the Salad Printer.

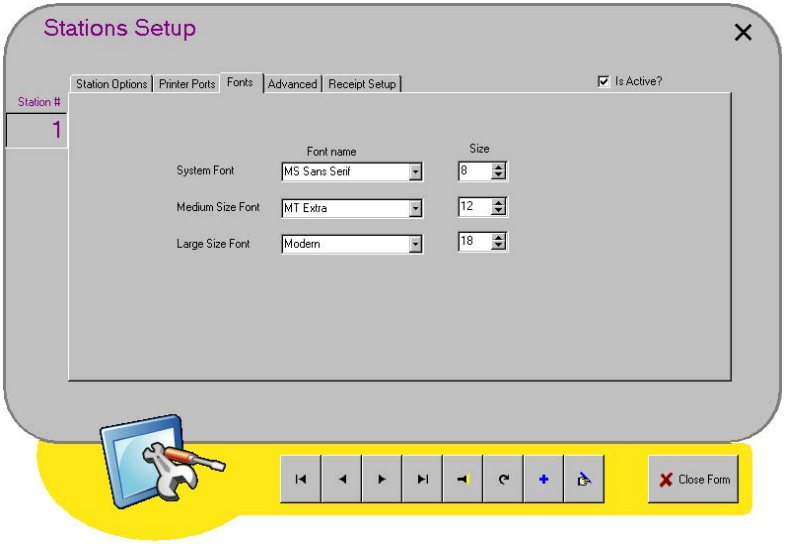
- **Charge Slip Printer** - This setting identifies which printer this station will print charge slips to.

- **Report Printer** - This setting identifies which printer this station will print reports (such as Cash Outs) to.

Fonts Tab

Administrator / Setup Stations / Fonts

This tab allows you to change the type and size of font used throughout the POS.



System Font

The settings on this line pertain to the navigational buttons, information boxes, table numbers and report information.

Medium Size Font

These settings pertain to the floor sections, modifier prompts and payment types.

Large Size Font

These settings pertain to all other areas of the POS.

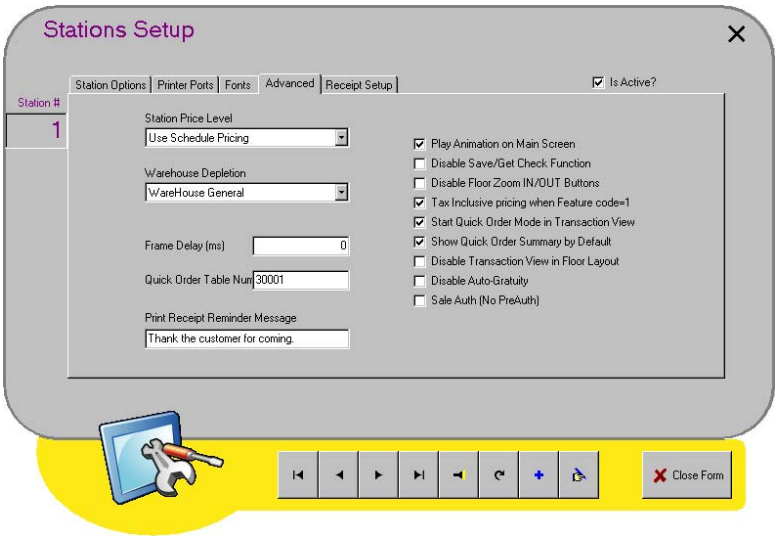
Auto-Font Sizing

Items that display in a list on the front-end, such as methods of payments and system interface selections, will have auto-scaling fonts that will adapt to the display configuration of that system.

Advanced Tab

Administrator / Setup Stations / Advanced

This tab contains advanced-level settings pertaining to the station.



Station Price Level

This field allows you to set price levels by station. For example, Station 1 may be set to use Price Level A whereas Station 2 would use Price Level B. If left at the default of Use Schedule Pricing, the stations will accept default to Price Level A unless programmed elsewhere (being Report Category, Sale Type or Member Group).

Warehouse Depletion

When applying inventory, you assign each station to a warehouse from which it will deplete stock. If the station depletes inventory that exists in other warehouses (such as a food and beverage order in which the station is assigned to a beverage warehouse), the depletion will show as a shortage on the assigned warehouse and an overage at the actual warehouse. Within Report Viewer is the Report Variance By Warehouse report. This will identify such level discrepancies.

Frame Delay (ms)

This field is no longer used.

Quick Order Table Num

If a quick order check is saved at this station, the order will be applied to a special table number defined here. The table number must be between 30001 and 32000. When you use the [Save Check] button, the order will be saved to the table number identified in this

field. Only stations that have that same table number programmed into their Quick Order Table Num field will be able to retrieve that order using [Get Check]. This is commonly applied in Bar Tab and Drive-Thru applications where you want to isolate saved checks to a restricted group of stations, preventing other stations from seeing and retrieving those checks.

Print Receipt Reminder Message

The contents of this field will display on the screen as a bulletin whenever the receipt prints. Use this whenever you need a reminder message displayed whenever a receipt is printed.

Play Animation on Main Screen

If checked, the default flash animation will play on the login screen. If unchecked, the flash will be replaced with a stationary PixelPoint logo.

Disable Save/Get Check Function

If checked, this will remove the [Save Check] button from the quick order screen. In so doing, the [Get Check] button will be unavailable too.

Disable Floor Zoom IN/OUT Buttons

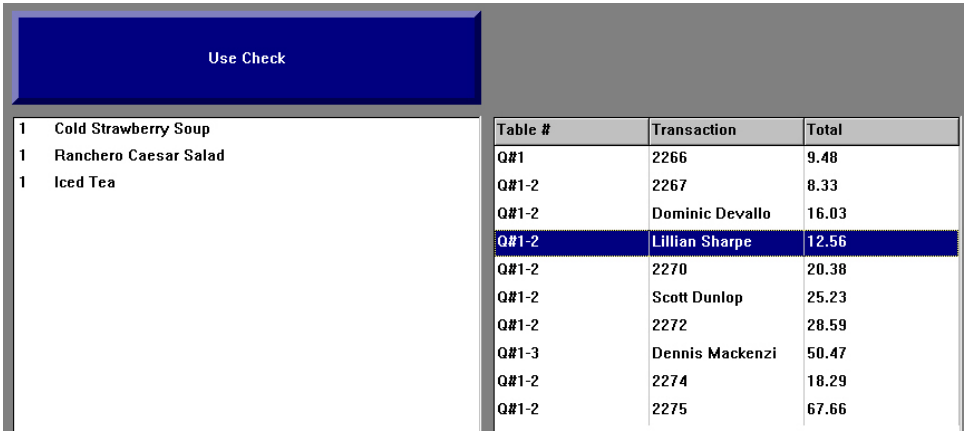
If checked, this will remove the [Zoom In] and [Zoom Out] buttons from the table layout screen.

Tax Inclusive Pricing When Feature Code =1

This enables tax-inclusive pricing for this station. Any item containing Feature Code 1 and ordered from this station will be priced with the tax included in the price. For example, Station 1 has this field checked, Station 2 does not. I order a beer for $4 at Station 1. My price is $4 including tax. I order that same beer from Station 2. I pay $4 plus tax. This is assuming that the Feature Code field (in the Product Setup screen for the Beer item) has a 1 in it.

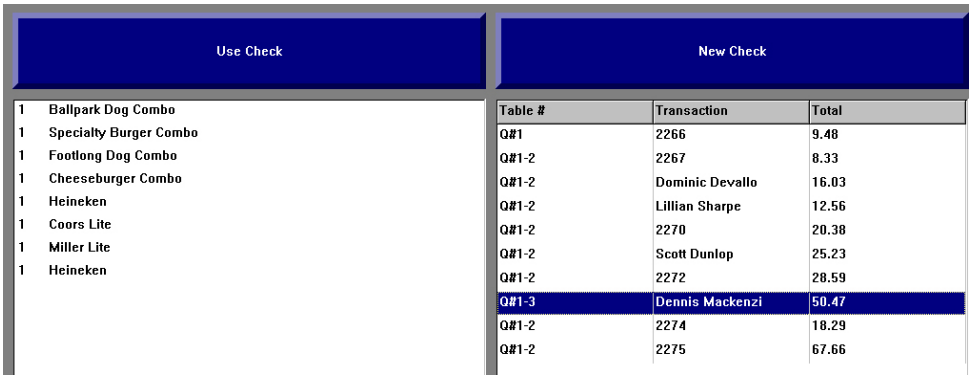
Start Quick Order Mode in Transaction View

If checked, anyone in quick order mode who logs into this screen will be presented with the transaction view screen (see below). If unchecked, those same users will be presented with a blank check.



Show Quick Order Summary by Default

This field works in conjunction with the "Start Quick Order Mode In Transaction View" field. If checked, the summary screen (see below) will display in quick order mode. Using this, a quick service user could easily retrieve either a saved check or generate a new check.



Disable Transaction View in Floor Layout

If checked, this will remove the [Transaction View] button from the table layout screen.

Disable Auto-Gratuity

If auto-gratuity has been programmed for this establishment, this allows you to selectively apply it to particular stations. This works well, for example, where you would not want auto-gratuity to apply to a station that manages take-out orders.

Sale Auth (No PreAuth)

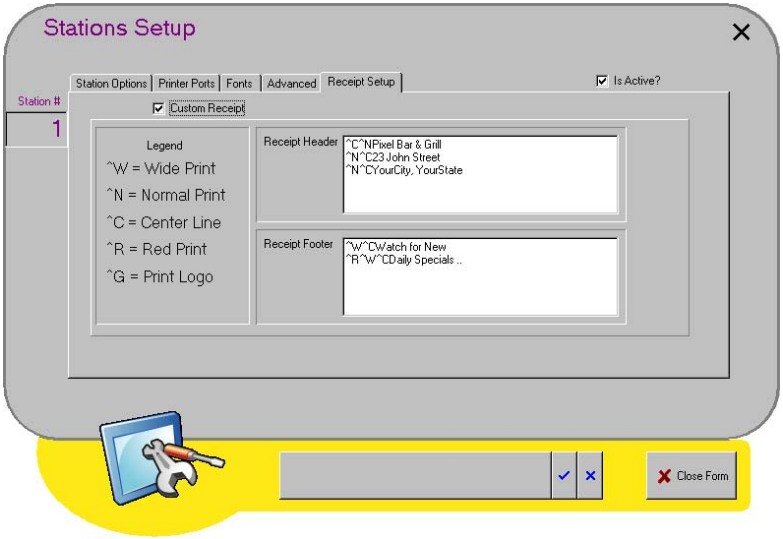
If using CreditCheck™, this allows you to set the station's credit authorizations for immediate credit settlement rather than pre-authorized. Charge tipping would not be required and the

charge would be settled immediately. This would be applied to stations that are used for Take Out orders and Retail transactions.

Receipt Setup Tab

Administrator / Setup Stations / Receipt Setup

This tab allows you to change the receipt header and footer that prints from this station.



Upon checking the Custom Receipt box, the screen will display the header and footer windows (see above). The header information will show up at the top of the customer receipt. The footer information will show up after the check total at the bottom of the receipt.

The special characters on listed in the legend can be applied to the header and footer as well. The red print feature may not be available depending on the type of printer. The same applies to the print logo feature.

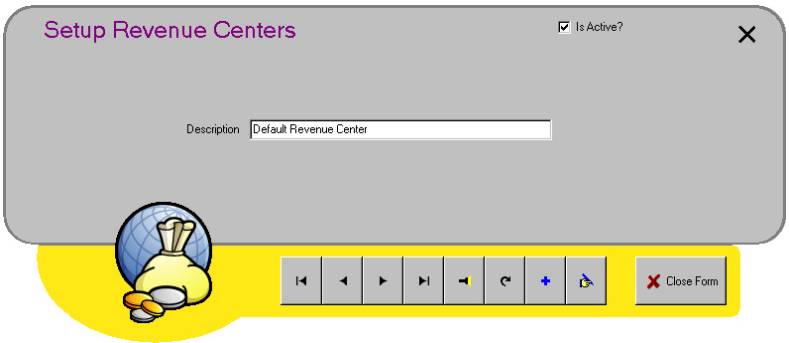
The Print Logo feature can only be applied if the designated printer has the ability to retain a graphic image. The print string for this uploaded image is entered into the Print Logo field located in Printer Codes Setup. Only then can you use the ^G feature. It is suggested that you leave the graphic image left justified. Centering the line setting may affect the appearance of the image.

The custom receipt screen should only be used if stations require different headers and footers (such as in an establishment with multiple revenue centers). The main receipt header and footer setup is found in General Setup / Receipt Setup.

Setup Revenue Centers

Administrator / Setup Revenue Centers

A revenue center is a business within a business (sometimes referred to as a profit center). For example, a hotel may contain a restaurant, a lounge and a retail shop. Though all three businesses reside in the one establishment, they are each run independently and each may have completely different POS requirements.

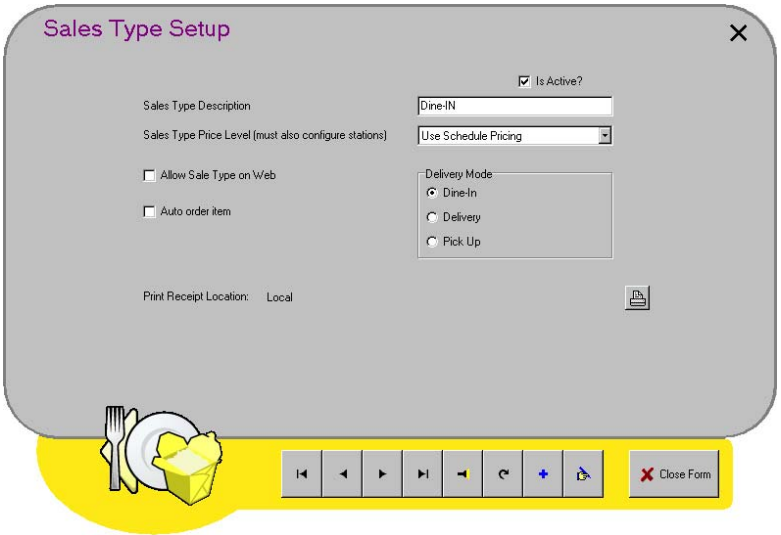


PixelPoint allows you to create these revenue centers (see above) and program the system to accommodate the different menus, screens and methods of operation for each. Upon creating a new revenue center, you will be able to apply stations, menus and employees to it. This will be reflected within your sales and operational reports.

Setup Sales Type

Administrator / Setup Sales Type

PixelPoint is capable of managing multiple sales types. Several of the most common sale types have been programmed by default. They are: Dine-in, Pick-up, Delivery, Catering, Drive-Thru and Quick Service.



Sales Type Description

This is the description of the sale type. You are permitted up to 30 characters.

Sales Type Price Level

This field allows you to set price levels by sales type. For example, the price of a sandwich could vary based on the type of sale:

- Pick-Up $5
- Dine-In $6
- Delivery $7

The default setting for this field is Use Schedule Pricing indicating to use whatever price level has been programmed elsewhere. The remaining selections (Force Price A through J) allow you to apply one of the price levels to this sales type.

Allow Sale Type On Web

You check this box to indicate that you want to allow this as one of the sale types that is offered for web-based ordering (WebToGo).

Sale Auth (No Pre-Auth)

You can set credit authorization to pre-authorization or immediate settlement based on sale type. If this box is checked, all credit transactions under this sale type will settle immediately without pre-authorization.

Auto Order Item

If checked, you will be presented with a product selection field. Select the desired item and it will be automatically ordered when this sale type is chosen. For example, if the sale type is Take Out, it may automatically order a condiment package or promotional item.

Delivery Mode

This affects the allocation of orders to the Delivery Order Taker's screens. If Dine-In is checked, all orders with this sale type will be excluded from the Delivery Order Taker's screens. If Delivery is checked, all orders with this sale type will show up on the delivery screen and drivers will be able to pick these orders for delivery. If Pickup is checked, all orders with this sale type will show up on the pickup tab and drivers will not be able to access them.

Print Receipt Location

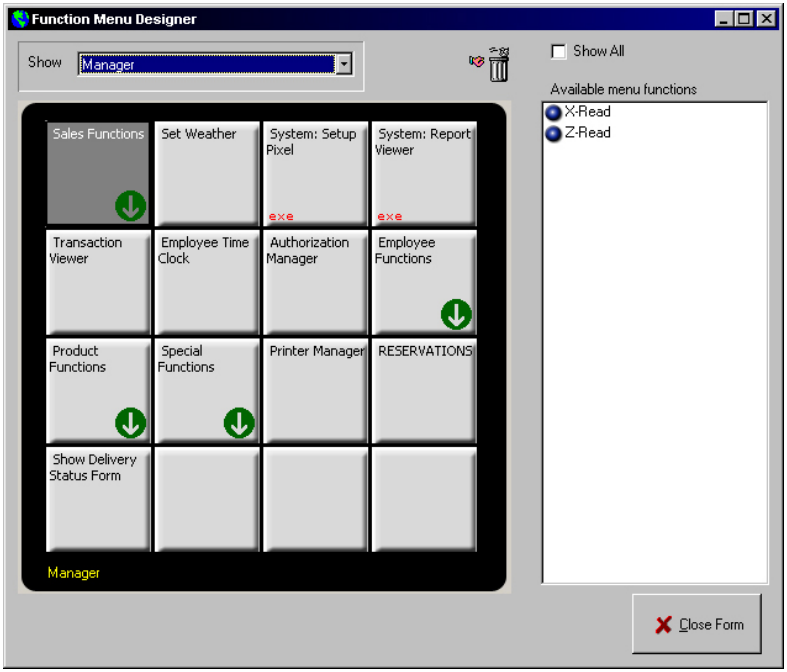
You can set the receipts for all transactions with this sale type to print to a specific location.

Note: Try to avoid making changes to the sale types that were already programmed. If you need to change the programming, it is recommended that you set the original as inactive and create a new one.

POS Functions

Administrator / POS Functions

This application allows you to modify the contents of the various function menus used in the front-end.



Show

This field allows you to select which menu window you wish to work on. The example above shows the contents of the Manager menu. Buttons with a green down arrow contain sub-menus which can also be accessed within the Show field. Those marked with a red exe are applications run from a separate executable program.

Buttons

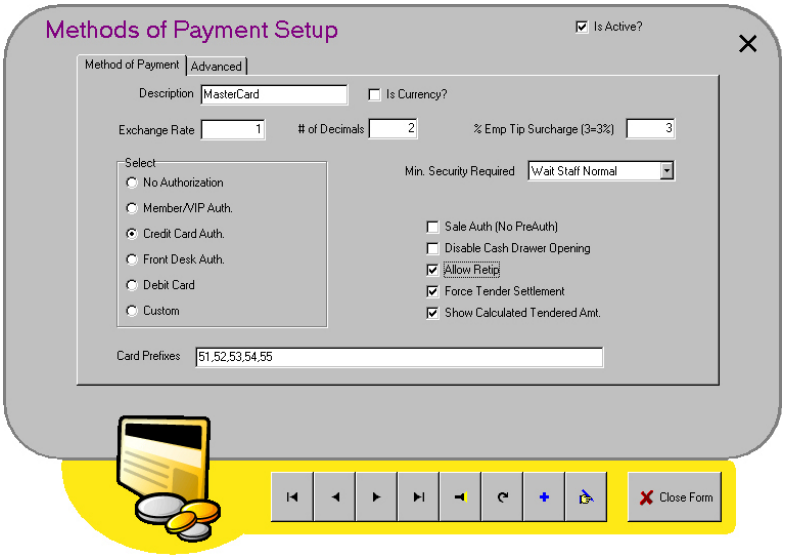
You can move the buttons around by clicking-and-dragging them. To remove a button, click-and-drag the button to the trash can icon. To add a function, select it from the Available Menu Functions list and drag it to the desired button location. To view all available functions, click the [Show All] box.

Note: This function is intended for the system installer only. It is not recommended that you change any of these settings.

Setup Payment Methods

Administrator / Setup Payment Methods

This is where you configure each method of payment. The first method (Cash) should always refer to local base currency in which the exchange rate is 1:1.



Description

Name of the method of payment.

Is Currency

Indicates whether the payment type is a currency or credit.

Exchange Rate

Used when configuring a foreign currency. The Exchange Rate represents the value of one foreign dollar in base currency. For example, if base currency is US Dollar, the exchange rate for a Canadian Dollar may be .75 whereas the exchange rate for a Euro may be 1.25.

of Decimals

Some national currencies do not use decimal places and some may use more than the default of 2. This field allows you to stipulate how many decimal places this method of payment uses.

% Emp Tip Surcharge

Normally the bank charges a transaction fee (surcharge) on each credit card transaction. The surcharge is a percentage of the total amount including the tip. This option allows you to deduct the tip's portion of the surcharge from the server's charge tip amount. For example, the charge tip is $10. The bank surcharge fee on the tip is 3%. This field ensures that the employee collects $9.70 the tip and the remaining $0.30 is retained by the establishment to cover the bank surcharge for processing that tip.

Min. Security Required

Enter the Minimum Job Title allowed to accept and process this type of payment.

Authorization Required

Select one of the following Authorization Types.

- No Authorization - Indicates that there is no authorization required for this type of payment. For example, with Cash you would not need authorization, with Credit/Account Cards you would need authorization.
- Member/VIP Auth. - Indicates to the system that the Payment Type entered is a Member or VIP Card.
- Credit Card Auth. - Indicates to the system that the Payment Type entered is a Credit Card.
- Front Desk Auth. - Indicates to the system that the Payment Type entered requires authorization from the Front Desk, i.e. Hotels/Motels.
- Debit Card - Indicates to the system that the Payment Type entered is a Debit Card and requires a card swipe and pin number entered.
- Custom - Indicates that the Payment Type requires a custom written authorization.

PixelPoint CreditCheck™ will be required for any authorizations other than "No Authorization".

Sale Auth (No PreAuth)

Allows to process charges as immediate settlement rather than pre-authorized. No charge tipping would be required for this Payment Type.

Disable Cash Drawer Opening

This prevents the cash drawer from opening when this method of payment is tendered. It is usually applied to credit transactions in which the charge slip is placed in a slot that feeds under the drawer insert.

Allow Retip

Some credit card verifications systems are unable to process tips more than once. If working with such a system, you can disable the ability to apply the tip more than once using this check box.

Force Tender Settlement

Applies this method of payment to the Tender Balance screen.

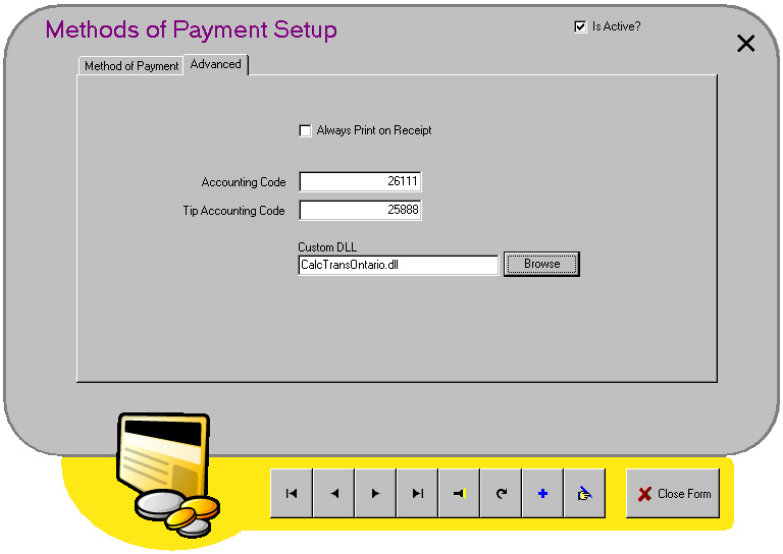
Show Calculated Tender Amt

If applied to the Tender Balance screen, this check box will determine if you wish to show the amount the system has calculated. If unchecked, the user will not be able to see that amount. This is referred to as a blind tender balance.

Card Prefixes

Enter the Card Number Prefixes for those cards that constantly have the same prefixes. This enables the system to recognize the Credit/Account Card type by reading the first few numbers in the card. For example, with VISA, you would enter 4 as its Prefix, with MasterCard, you would enter 50, 51, 52, 53, 54 as its Prefix, etc for other credit type cards.

Advanced Tab



Always Print on Receipt

This indicates to the system that the receipt should always include the amount due for this method of payment. For example, the establishment accepts a foreign currency. You want the receipts to include the amount due in that currency. By checking this, the receipt will include the amount due in this currency with the exchange rate already calculated.

Accounting Code

Allows for assigning accounting code that can be used for interfacing with accounting software.

Tip Accounting Code

Allows for assigning accounting code that can be used for interfacing with accounting software.

Custom DLL

If a custom DLL is required for this method of payment, you apply it here. The DLL file would typically be located in the DLLs folder within \PixelPOS.

No Swipe

The check box "Do Not Ask For Swipe" will prevent PixelPoint from prompting for a card swipe. It is designed for payment methods that work with third-party software and hardware in which the agent will handle the prompting.

Order Templates

Administrator / Order Templates

The order template is a customizable screen from which the user places the check's order. The screen is divided into four sections.

Receipt Section 1

As items are ordered, they will appear in here. This area contains the quantity, description and price of the item. It will show up on the Finish screen and anything bearing a price will show up on the receipt as well.

Product Grid 2

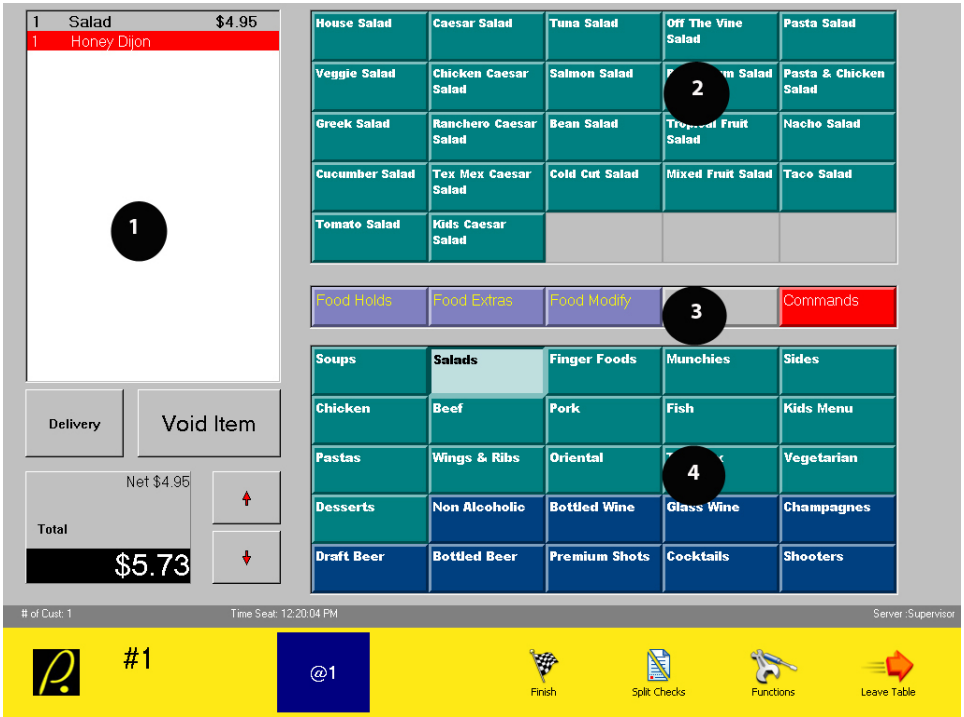
This grid contains the ordering products (sometimes referred to as menu items). Upon selecting the desired product, the item will appear in the Receipt Section.

Modifier Page Grid 3

This grid contains modifier pages such as Food Modify and Bar Modify. The buttons displayed in this grid change based on the product you have selected. For example, if you select a beverage product, the contents of the Modifier Grid would change to bar-related modifier pages. If you select a food product, the contents would change to food-related modifier pages. Upon selecting one, the contents of the Product Grid change to related modifier products.

Order Page Grid 4

This grid contains order pages which each represent groups of products (such as Soups, Desserts and Wines). Upon selecting one, the contents of the Product Grid change to present products related to that Order Page.



Sale Type Button

This button allows you to select the type of sale for this check. The button in the sample image shows [Delivery].

Void Button

This button allows you to void the item selected in the Receipt Section. Without selecting anything, [Void Item] will void the last item on the order (in the Receipt Section).

Table Info Window

This area displays the Net and Final total of the check.

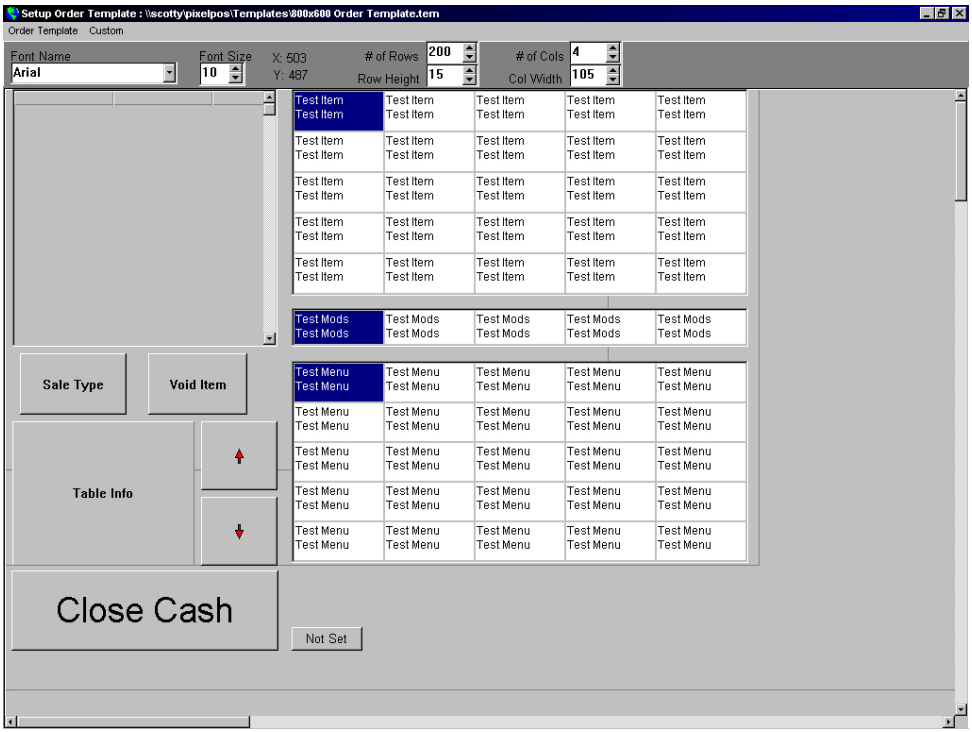
Arrow Buttons

This moves the contents of the Order Page Grid up and down. It allows you to toggle between menu levels. For example, the Order Page Grid shows 5 rows of order pages. However, when setting up the order page buttons in Menu Setup, you use those first 5 rows for the Breakfast Menu. The next 5 rows are assigned Lunch Menu buttons and the next 5 rows below that are assigned Dinner Menu buttons. On the front end, the Breakfast Menu (first 5 rows) will display. To view the Lunch Menu, select the Down Arrow button. The POS will remain on the Lunch Menu until you select either of the arrow buttons to go back to Breakfast or advance to the Dinner menu.

Customizing The Order Template

PixelPoint includes many order templates which you can choose from. To view and modify any of them from here, select the [Order Template] pull down menu in the top left corner of the screen. Pick [Load Template]. A window will display showing all of the TEM files located within the Templates folder. The templates will vary in size from 640x480 to 1024x768. Upon selecting a template, it will display on the screen.

To apply changes to any of the grids, simply click on it and you can change any of the settings located in the gray task bar displayed across the top of the screen. You can change the font, font size, number of rows, height of the rows, number of columns and the width of the columns. The grid display will reflect these changes as they're made. You can also move any of the grids using a double-click-and-drag.



You can also click-and-drag any of the buttons, the Table Info window and the Receipt Section in order to relocate them to another part of the screen. Moving to the top left corner of the selected item, your cursor will change to diagonal arrows. Apply click-and-drag on this to resize.

Dimension Lines

If you scroll down or to the right of the template area, you will notice some gray guidelines. These represent the dimensions of a 640x480 screen, 800x600 screen and 1024x768 screen. Use them to help size the order template you are working on.

Removing A Permanent Item

To remove one of the permanent screen components from the display, simply move it outside of the template's view area.

Order Template Menu

Located in the top left corner of the screen is a pull down menu called [Order Template]. It's selections are as follows:

- Load - Load an order template that already exists.
- Save Template - Save the order template under its current name.
- Save As - Save the order template under a new name.
- Exit Template Setup: Exits Order Template and returns to the BackOffice system

Note: All templates must be saved on the Server in the templates sub-folder (\pixelpos\templates).

Custom Function Buttons

In the previous example, you will notice two other buttons at the bottom of the display titled [Close Cash] and [Not Set]. They are custom function buttons that you can apply to your order template. To apply a custom function button, go to the top of the screen and select [Custom] then [Add New Function Button]. A small button labelled [Not Set] will appear in the top left corner of the screen. Click-and-drag to move the button. You can resize it with a click-and-drag in the top left corner of the button.

Right-click on the button and select [Set Custom Function]. A window will display listing all available functions. They are as follows:

Charge Gratuity - Asks you to enter gratuity amount (%).

Close Cash - Will close the check to cash assuming exact change.

Create Splits by Seating - Splits the check by seating position.

Detailed Order Info - Displays detailed information about the order.

Easy-Add New Item - Adds new products to the order screen.

How to Make Item - Displays how to make information.

Label - Creates a check label.

Member/Delivery - Brings up the Member window.

Move Items - Move items to another table.

Move Table - Move the check to another table or join with another table's check.

PLU Lookup - Order an item using a Price Look-Up number.

Post Inv Usage - Post manual adjustments to inventory levels.

Preset Quantity - A quantity button with a set value.

Print Receipt - Prints the receipt.

Quick Unclose - Shows the last 20 closed transactions allowing you to unclose one.

Re-Order - Reorder previously ordered items.

Return Exchange Item - Apply a credit to the receipt (used for refunds).

Seat Number - Jump to a specific seat number.

Send Order - Send the order without leaving the check.

Set # of Customers - Change the number of customers at current table.

Size Down - Down size the selected item.

Size Up - Up size the selected item.

Stop All timers - Stops all rated items in current table.

Transfer Check - Transfer the check to another employee.

Void Entire Check - Voids all ordered items on the entire check.

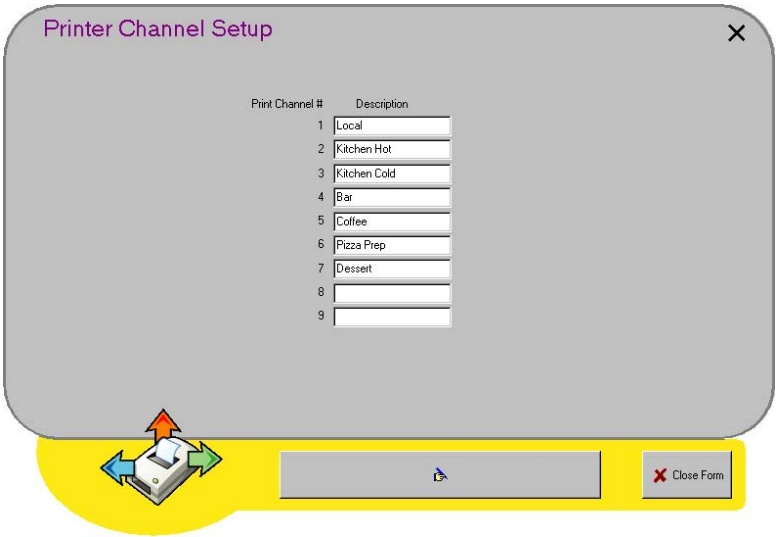
If you want to change the displayed text on the button, right-click and select [Change Text]. Use the font and font size selections in the task bar to change the appearance of the text. You can also remove the button by right-clicking on it and selecting [Remove Button].

Once completed making changes, you can Save This Template, or Save As a New Template using the options under the Order Template Menu.

Setup Printer Channels

Administrator / Setup Printer Channels

Upon determining your printer channels (refer to Printing Concepts), you create them here. You do not need to use all available channels but make sure that the first printer channel is always Local. The reason for this is that Advanced Option printing is initiated through the local printer channel and they are set to default to the first printer channel (refer to Setup Stations / Printer Ports Tab).

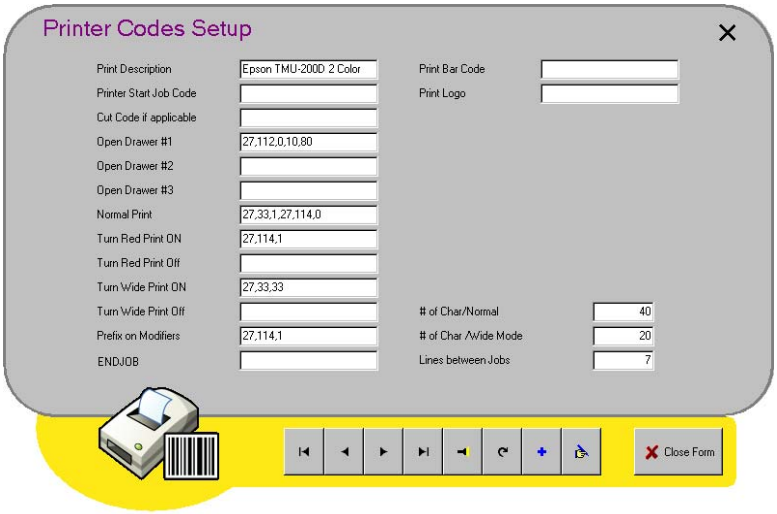


You do not have to use all 9 print channels. Use only those that you need.

Setup Printer Codes

Administrator / Setup Printer Codes

This screen allows you to set Printer Codes for each type of printer that you may be using. The system already comes with several different printer types with their default settings and codes already assigned.



You can leave the printer settings to the manufacturer's specifications or can customize the codes to better suit the establishment's requirements. You can locate many of these codes either within the printer's manual or the manufacturer's web site.

Note: Printer codes used must be numbers separated by commas.

Printer Start Job Code

This will indicate to the printer to start a print job.

Cut Code if Applicable

This will indicate to the printer to cut the paper after printing.

Open Drawer #x

This will send a signal through the printer to the cash drawer telling it to open. You can attach up to 3 cash drawers per station.

Normal Print

Codes to generate normal-sized text.

Turn Red Print On/Off

Codes to activate and deactivate printing text in red (for printers with black/red ink ribbons).

Turn Wide Print On/Off

Codes to activate and deactivate wide text printing (such as title lines and remote printing).

Prefix on Modifiers

Codes to indent lines for Modifiers.

End Job

Codes to indicate when a print job has completed.

Print Bar Code

Applies a printed bar code of the transaction number (not available on all models of printers).

Print Logo

Applies to the print string of an image saved within the printer to produce a graphic image. The printer must have the ability to retain a graphic image in order to use this function.

of Char/Normal

Maximum number of normal-sized characters that can be printed on a single line.

of Char/Wide Mode

Maximum number of wide-sized characters that can be printed on a single line.

Lines Between Jobs

Number of blank lines to be applied between print jobs.

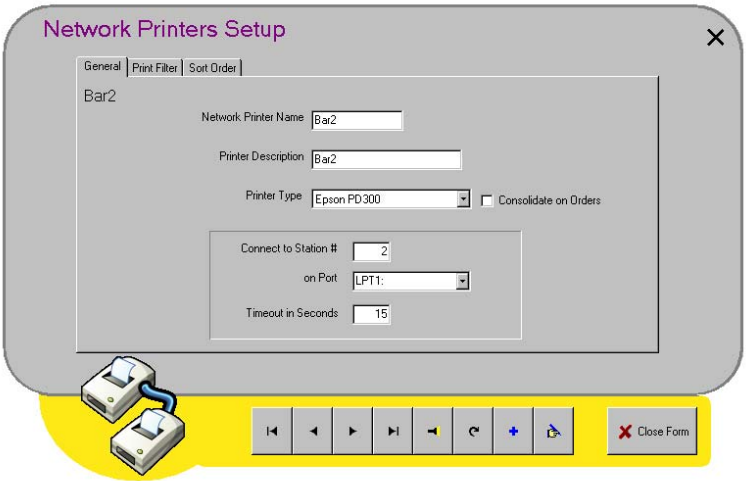
Setup Network Printers

General Tab

Administrator / Setup Network Printers / General

For every physical printer on the system, you must program a network printer into PixelPoint. For example, if there are 5 printers tied into the POS system, you must have 5 (and only 5) printers programmed into PixelPoint.

Note: Do not edit or remove the 'No Printer' record. It is necessary in order to allow the deactivation of a print setting.



Network Printer Name

Each network printer should be given a unique name. The name should describe its primary function plus the station it is tied into. If a printer is being used for both local printing and remote printing, the remote print would be its primary function. For example, if the printer is used to generate bar orders, its primary function would be Bar. If wired into Station 2, the name should be Bar2.

Printer Description

The network printer name is sufficient for this in most cases, but you can change this description to better differentiate one printer from another. The description will show up alongside the name when assigning printers to station printer channels (refer to Station Setup / Printer Ports Tab).

Printer Type

Select the type of printer being set up. The list of available types is generated from the records defined in Printer Codes. If the desired printer is not listed, you can create your own printer record through the Printer Codes screen.

Consolidate On Orders

Check this if the printer is being used for remote printing and you wish consolidated items to show up as such on this printer. Refer to Printing Concepts for further explanation of print consolidation.

Connect to Station

Enter the Station number that the printer is physically connected to.

On Port

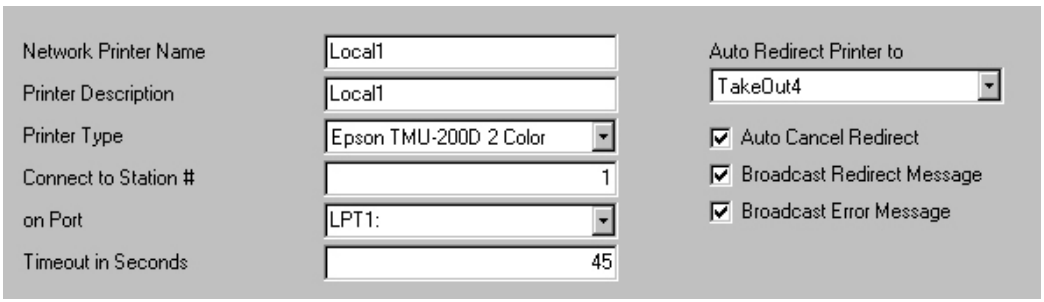
Select which port on the station that the printer is connected to. A pop-down list will display all possible ports.

Timeout in Seconds

This specifies how much time (in seconds) the system will wait for the printer to respond to a print command before initiating an error. Serial port printers should be set for about 40 seconds and parallel port printers about 15 seconds.

Printer Redirection

The POS can auto-redirect printing if a printer goes down. It can also auto-cancel the redirection for printer errors and auto-broadcast the redirection message (both of these optional).

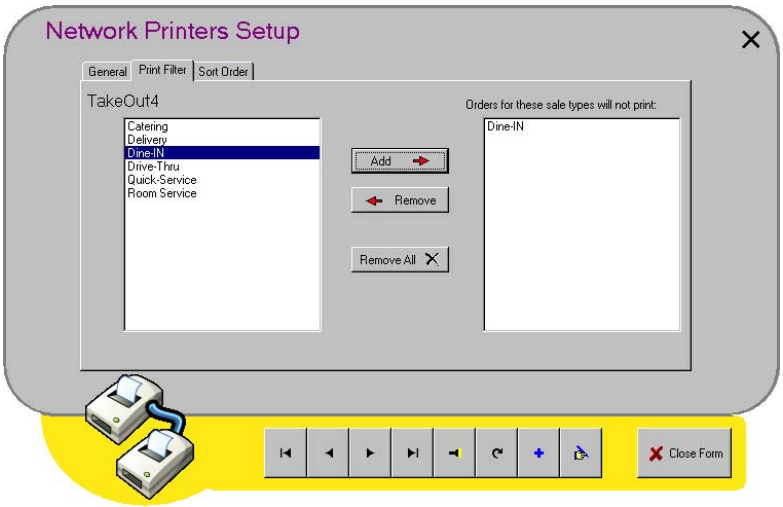


Print Filter

Administrator / Setup Network Printers / Print Filter

This tab is used to filter remote prints by sale type. It is used in situations where you want a printer to generate orders only if the sale type matches what that printer allows.

For example, you have two printers in the kitchen; one for Dine-in orders and one for Take-out orders. Program the station to print to both printers. Then within each printer's setup, go to the Print Filter tab and identify which orders you want to filter out. The Dine-In printer would filter Take-Out orders. The Take-Out printer would filter Dine-In orders.



The window on the left displays all sales types programmed into PixelPoint. Select the sale type you wish to filter out and select [Add]. This will move it to the window on the right. All orders in which the sale type matches one of the entries in the right window will not print. The [Remove] button will place the filtered sale type back into the allowable list. [Remove All] will move all selections to the left window, allowing all sales types.

Sort Order Tab

Administrator / Setup Network Printers / Sort Order

You can program how you want remote prints to come out using this screen. The remote print can be set to group and sort its printed contents by one of five orders.

Course

If course sorting has been applied within Product Setup, this will allow you to group and sort your remote prints by the course. For example, the Appetizers will print, then the Main Course items, then the Desserts.

Seating

If seating positions have been applied, this will allow you to group and sort your remote prints by seat number. For example, Seat1's order will print followed by Seat2's order and so on.

Report Category

This will allow you to sort your remote prints by the report categories of the various items. For example, all pasta dishes would be grouped together as would the beef dishes, the chicken dishes, the desserts and so on.

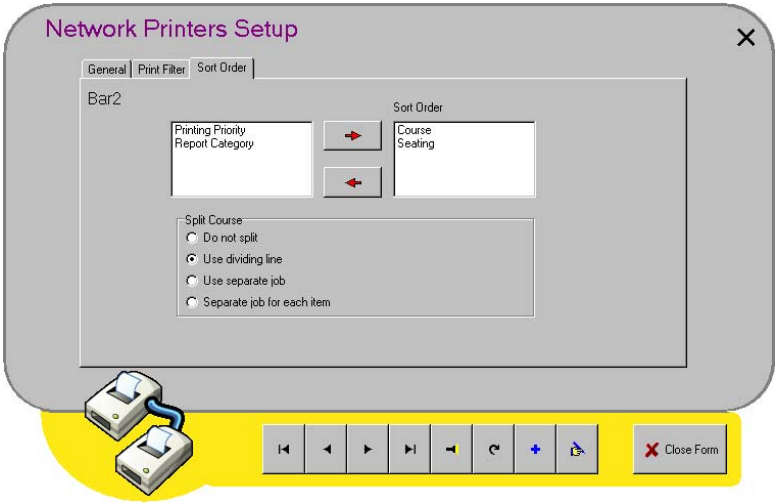
Printing Priority

You can define your own order of printing using Print Priority (defined within Product Setup). For example, you want all combos first, then single burgers and so on. The Print Priority field will determine this. The higher the number, the higher the priority. Sorting by Printing Priority will ensure (on this printer) that the items print in the order of their designated number, from highest to lowest. You can assign up to 999,999,999 levels.

No Selection

If no sort order is selected, the remote print will be in the order of entry.

Note: You can combine sort orders. The first one selected (showing at the top of the Sort Order list) will be the primary order. However secondary sorts could take place under that. For example, you could sort by Course followed by Seating Position. So the kitchen print would show each course and within each are the seat orders for that course.



Split Window

The split window applies to the primary (first on the list) sort order. If Course is the primary sort order, the split will apply between each course. However, if Seat were selected as the primary sort order, the split would apply between each seat.

Do Not Split

This prevents any splitting between the primary orders. The contents of the remote print will not be divided, other than by applying the appropriate primary order titles.

Use Dividing Line

A line will print between each primary order. For example, if Seating were the primary order, the remote print would present Seat1 followed by its contents. Then a line followed by Seat2 and its contents.

Use Separate Job

Each part of the primary order criteria will be on a separate print. For example, an order chit will print for Seat 1, then an order chit will print for Seat 2 and so on.

Separate Job For Each Item

Each ordered item will have its own separate print. For example, an order chit for the Chicken Soup at Seat 1 will print, then an order chit for the Salad at Seat 2 will print and so on. This is used in situations where order contents are handed to a variety of staff to prepare.

WebToGo Setup

WebToGo Concept

WebToGo™ is an add-on module that allows you to accept orders placed over the Internet. Customers access the establishment's web site which contains a link to the WebToGo system. It allows the customer to create their own member account, log in, browse the menu, place their order and pay for it. This section describes its design and how to configure WebToGo.

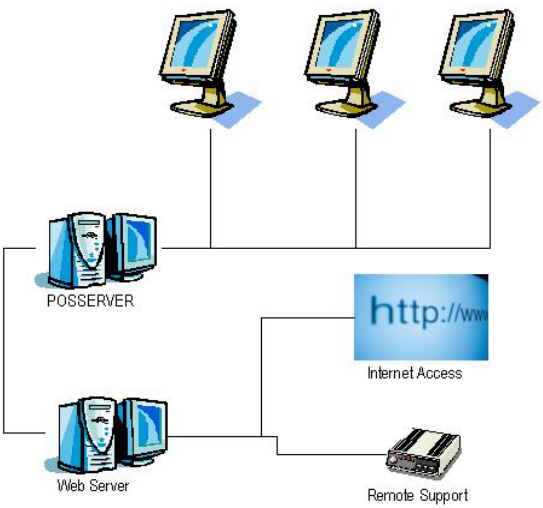
Specifications

- A dedicated web server running Windows 2000 Pro or Server
- IIS (Internet Information Services) installed
- 256MB RAM, 10GB, 1Ghz
- All necessary Windows updates and service packs
- A dedicated Internet connection with a static IP address
- PixelPoint POS Version 7.x with CreditCheck and proper licensing for WebToGo
- Remote communication software (PCAnywhere or VNC) for remote configuration work

Note: These minimum specifications are subject to change based on internet traffic and site requirements. Consult with PixelPoint Technologies before acquiring a web server PC.

Concept

Working in conjunction with the store's PixelPoint POS system, you install a PC dedicated to maintaining the WebToGo system and managing the intake of Internet orders.



The Web Server is a standalone PC that resides at the client site. It must have 24 hour connection to the Internet with a static IP plus the ability to be connected to remotely using software such as PCAnywhere or VNC. The Web Server and POSSERVER are connected via Local Area Network (LAN) to allow internet orders to be processed on the POS.

The Web Server basically acts like one of the front-end stations. Customers connect to the WebToGo order system and place their order. It is then relayed through the LAN just as a station would and the order prints in the kitchen and is retained on the POSSERVER.

Order Status

Upon accessing WebToGo, the user will be able to view details about a current order or future order (see below).

Recent Order(s)
Transaction refrence: 287689
click here to view detail
Ordered at: 09/03/2005 15:04:43 , Delivery
Scheduled for: Immediate processing (ordered on-line)
Delivery driver:
Supervisor Supervisor
Driver has delivered the order at 10/03/2005 12:58:47
Transaction refrence: 287690
click here to view detail
Ordered at: 09/03/2005 15:08:19 , Delivery
Scheduled for: Immediate processing (ordered on-line)

This window will display on the first screen upon logging in. It will provide information on any order placed on the current day (pick up or delivery) or scheduled for a future time.

WebToGo Website Setup Tab

Administrator / WebToGo Setup / Website Setup

Within this section, we will review the fields in each tab. Their purpose is to allow you to configure WebToGo to match the look and feel of the establishment. Be cautious when making changes to these settings and take note as to what they were before you applied the change.

System uses WebToGo

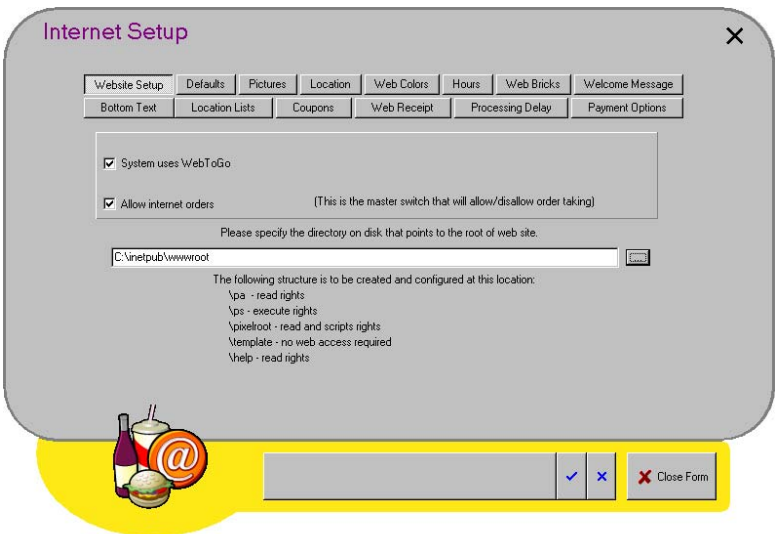
This check box will activate the interface between PixelPoint POS and the WebToGo module. Upon checking this, all of internet-related tabs throughout BackOffice will now be displayed.

Allow Internet Orders

This check box activates the ability to place orders through WebToGo. If unchecked, users can only view the web menu.

Directory Path

You will also be required to specify the root directory for the web site. Use the browse button to locate root directory for the web site (such as c:\inetpub\wwwroot).



WebToGo Defaults Tab

Administrator / WebToGo Setup / Defaults

The entries for the Defaults tab allow you to pre-program items which the system will use when applicable.

Default Internet Employee

Use this to create an employee with general server (Wait Staff Normal) security settings and apply to this field. All web-based orders will be credited to this employee. It is for reporting purposes.

Default Message Item

This field pertains to general text such as “on the side”. Any product designated as a Manual Keyboard product can be applied here.

Default Seating Position

This requires a Seating Position product. This is used in situations where Buddy Ordering is applied. The system uses seats to isolate one buddy member from another on the order.

Minimum Charge

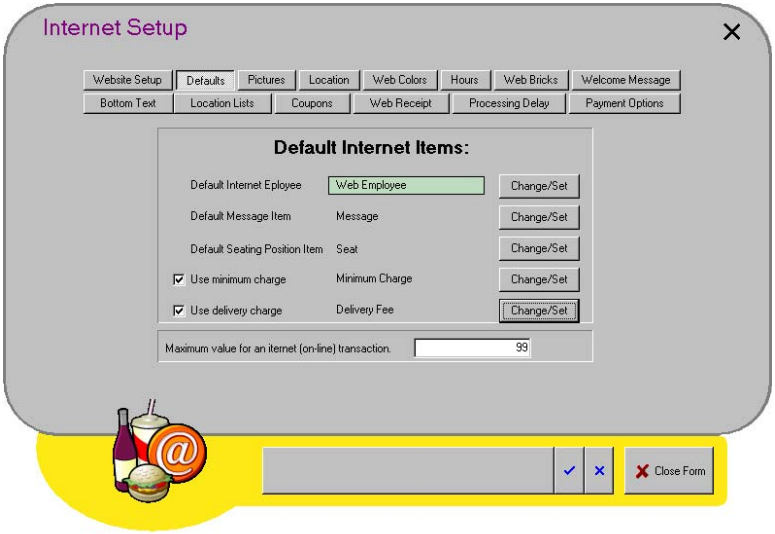
You can invoke a minimum charge to web-based orders by checking the box and applying a product designated as a Minimum Charge product. The system will then automatically apply this minimum charge item to each internet order.

Delivery Fee

You can also invoke a delivery charge to all web-based delivery orders by checking the box and applying an Ordering Product. It would be best if you created a product appropriately named and priced.

Maximum Value

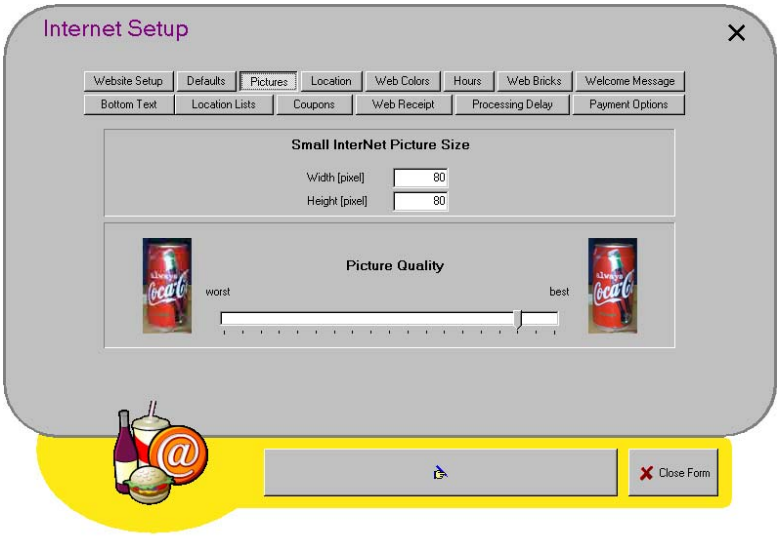
This field allows you to apply a cap to the allowable size of internet orders.


Internet Setup
Website Setup
Defaults
Pictures
Location
Web Colors
Hours
Web Bricks
Welcome Message
Bottom Text
Location Lists
Coupons
Web Receipt
Processing Delay
Payment Options
Default Internet Items:
Default Internet Eployee
Web Employee
Change/Set
Default Message Item
Message
Change/Set
Default Seating Position Item
Seat
Change/Set
Use minimum charge
Minimum Charge
Change/Set
Use delivery charge
Delivery Fee
Change/Set
Maximum value for an iternet (on-line) transaction.
99
Close Form

WebToGo Pictures Tab

Administrator / WebToGo Setup / Pictures

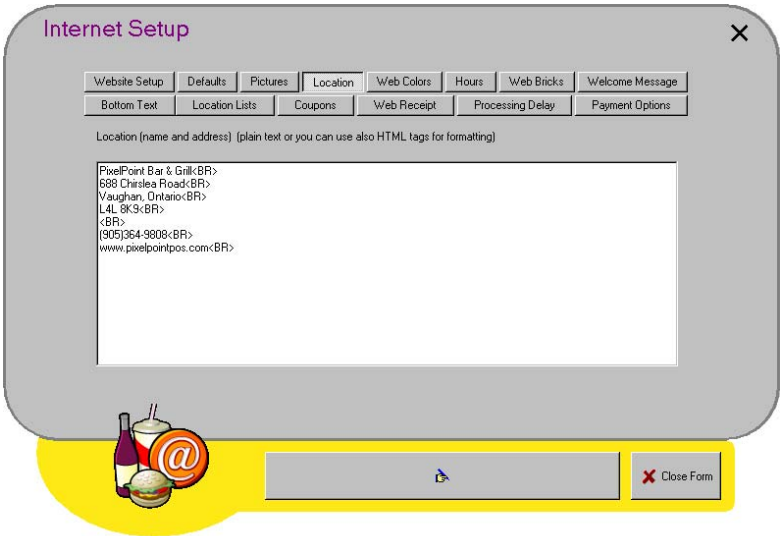
The Pictures tab allows you to define the resolution of images. The higher you set it, the better the quality however it may be slower to generate the image on some Internet connections. It is set to 80x80 quality by default which is a reasonable mid-range setting. It is suggested that you leave it there.



WebToGo Location Tab

Administrator / WebToGo Setup / Location

The Location tab provides information explaining where the establishment is. This can include directions to find it. Note the addition of <BR> at the end of each line. Make sure you include this when entering information here.



WebToGo Web Colors Tab

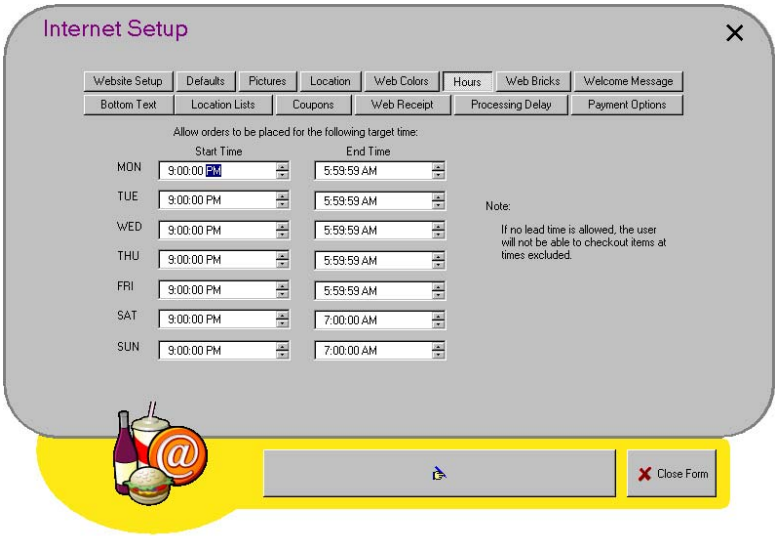
Administrator / WebToGo Setup / Web Colors

The Web Colors tab allows you to define WebToGo's color scheme. Use this to blend the module with the rest of the customer's web site. It is recommended that you leave it with the default colors until after the site it up and working. Then work on the colors later to match it up with the rest of the customer's web site. If you know the hexadecimal value of the web site's colors, you can apply them directly. If not, double-click on the Hex Value field and select a color that closely matches what you want. You access this field by scrolling to the right in this window.

WebToGo Hours Tab

Administrator / WebToGo Setup / Hours

The Hours tab allows you to set the hours in which the establishment will accept Internet orders. If outside of this time range, users will be able to browse the menu but will not be able to place an order.



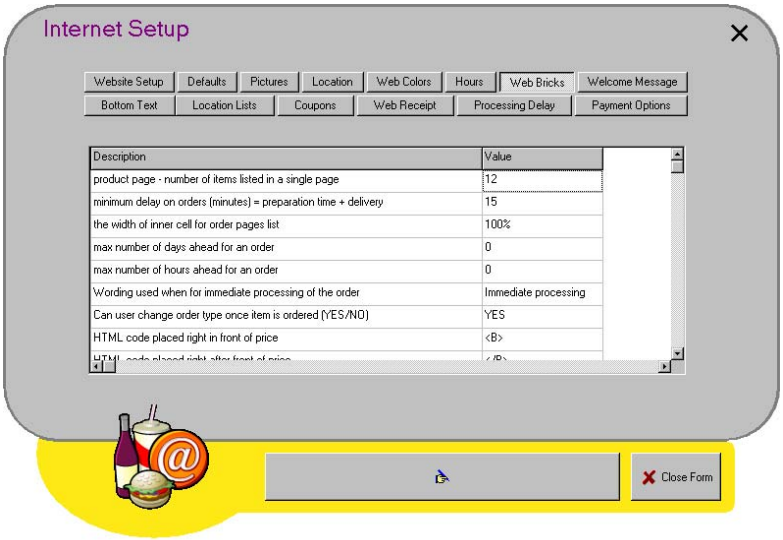
WebToGo Web Bricks Tab

Administrator / WebToGo Setup / Web Bricks

The Web Bricks tab dictates much of WebToGo's operational settings. To change the default settings for any of these fields, double-click on the value to change it. Only change settings that you are sure of and take note of each field's value before changing it in case you need to change it back.

Specific settings which may require your attention are as follows:

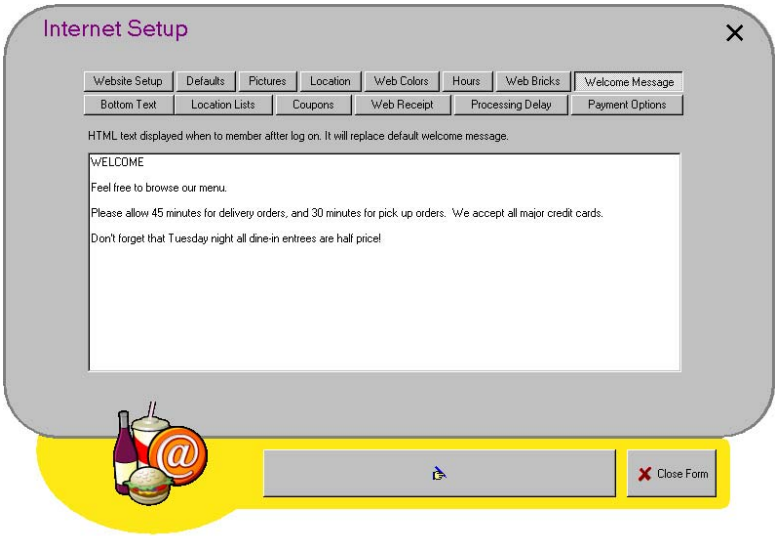
- Minimum delay on orders…
- Max number of days…
- Max number of hours…
- Email server IP…
- Home page URL…



WebToGo Welcome Message Tab

Administrator / WebToGo Setup / Welcome Message

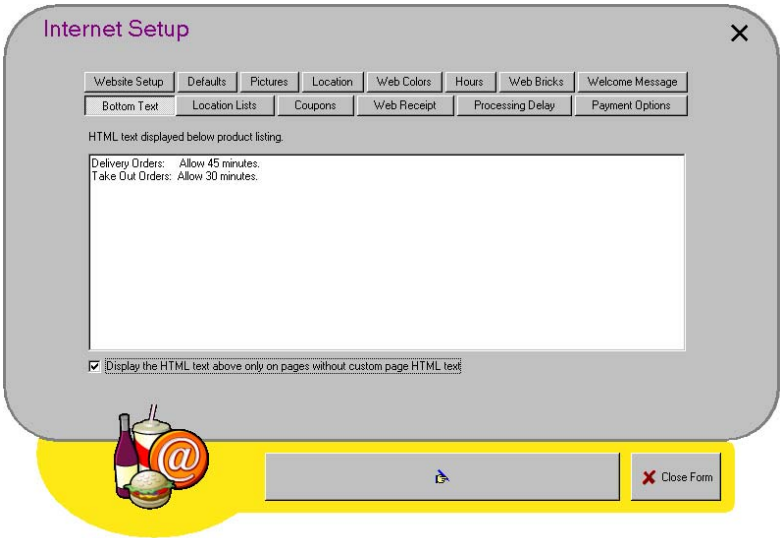
The Welcome Message tab allows you to enter a welcome message that will appear on the first screen once you get into WebToGo. If you leave this blank, it will default to the order help screen (as seen in the demo version on PixelPoint's web site).



WebToGo Bottom Text Tab

Administrator / WebToGo Setup / Bottom Text

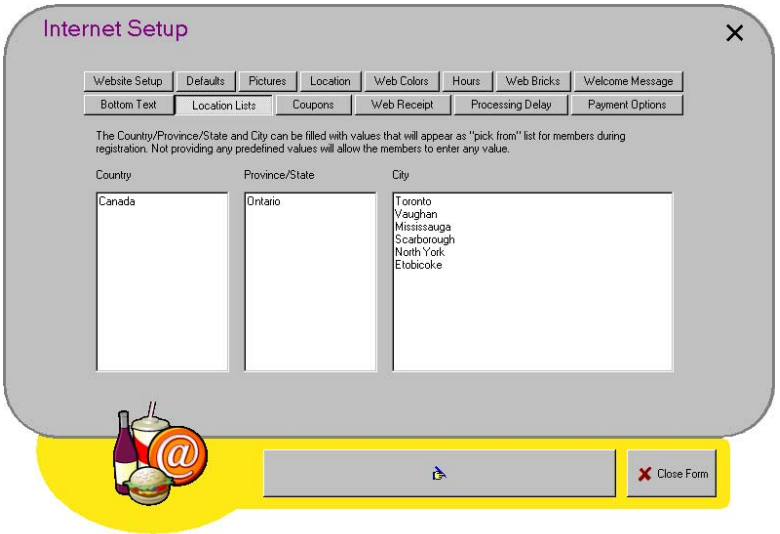
The Bottom Text tab allows you to add pertinent information to the bottom of the display (below the list of products on the menu screen).



WebToGo Location Lists Tab

Administrator / WebToGo Setup / Location Lists

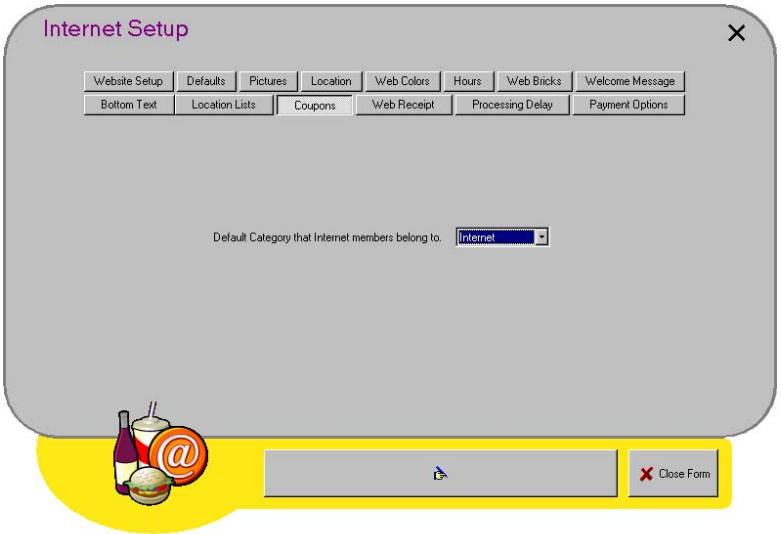
When entering member information, you can set default locations that the user may pick from. This allows the client to establish defined limits to their allowable delivery area.



WebToGo Coupons Tab

Administrator / WebToGo Setup / Coupons

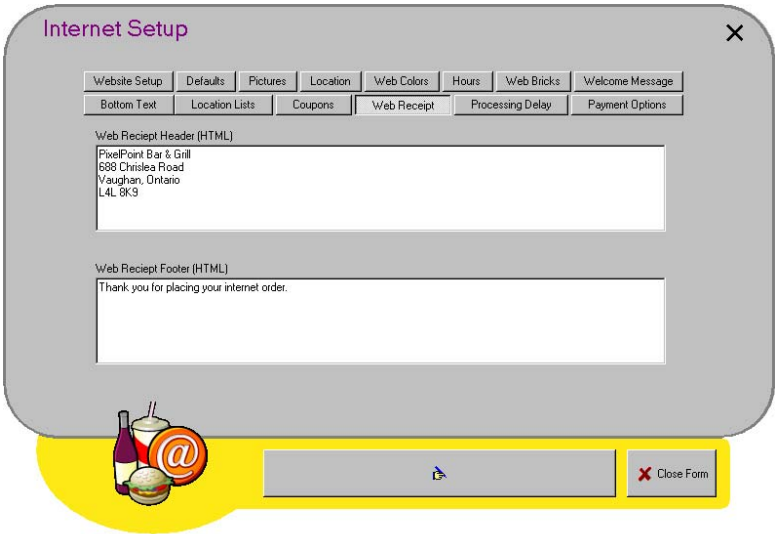
When adding an Internet member, you can define which member group you wish to assign them to.



WebToGo Web Receipt Tab

Administrator / WebToGo Setup / Web Receipt

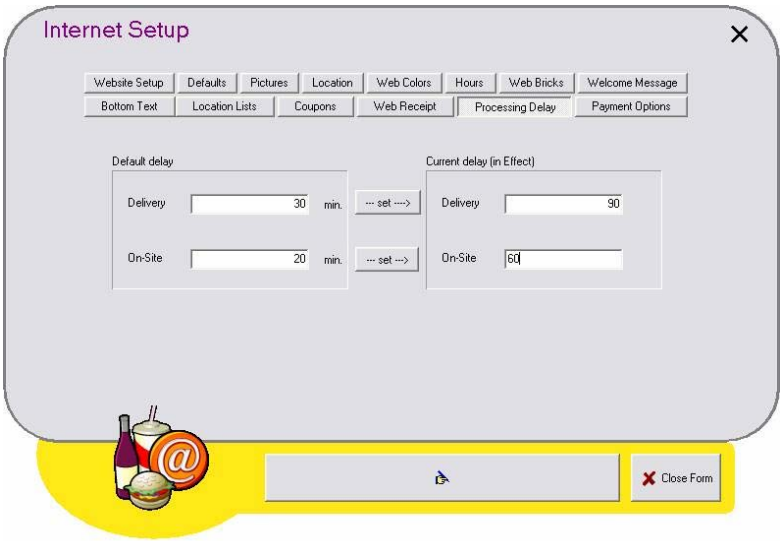
The Web Receipt tab's header and footer acts just like the local POS receipt header and footer. However, this text would be more oriented for web orders.



WebToGo Processing Delay Tab

Administrator / WebToGo Setup / Processing Delay

This tab is divided into two windows. The Default Delay window allows you to set the normal wait time for a delivery order and take-out order. The Current Delay window on the right allows you to change that default time. For example, if the establishment was extremely busy or if you were short on delivery drivers, you may need to extend the delivery time. Place the extended time in the Current Delay window. To return to the regular delivery time, select the Set button between the two windows.



This function is also available at the front-end by selecting **Manager / Product Functions / Set Est. Delivery/PickUp Times**. The only difference is that you cannot change the Default time at the front-end. You can, however, suspend the allowance of Internet orders. Refer to the PixelPoint User's Manual for further information.

When the default time is being used, web orders will show the delivery time under the check (see below, left). When the extended time is being used, a special warning will appear indicating that the wait time may be longer (see below, right).

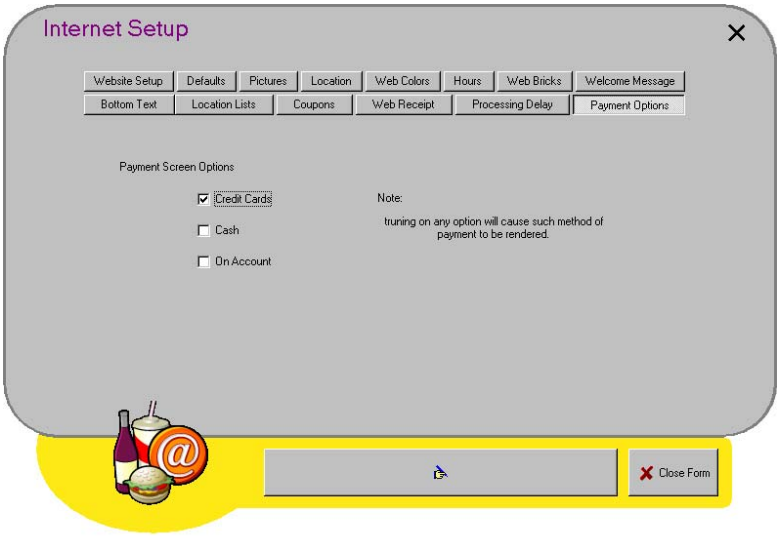
Your Order
1 Tuxedo Brownie Cake £4.50
1 Fried Cheesecake £4.50
1 Key Lime Pie £4.75
1 Apple Pie £4.50
favorite
modify
remove
FST = £1.37
Checkout
Total = £19.62
This order is for: Delivery
Date & Time Immediate processing
Click to enter special instructions
Current processing time is 30 minutes.

Your Order
1 Tuxedo Brownie Cake £4.50
1 Fried Cheesecake £4.50
1 Key Lime Pie £4.75
1 Apple Pie £4.50
favorite
modify
remove
FST = £1.37
Checkout
Total = £19.62
This order is for: Delivery
Date & Time Immediate processing
Click to enter special instructions
Notice
Current processing time for Delivery is 90 minutes.

WebToGo Payment Options

Administrator / WebToGo Setup / Payment Options

On the Payment Options tab, select the payment types you are going to allow for Web orders. If a credit payment type is chosen, the web customer will be required to settle the transaction at the time of ordering. If a cash/currency method of payment is chosen, the transaction will remain open until settled at the time of pick-up/delivery.

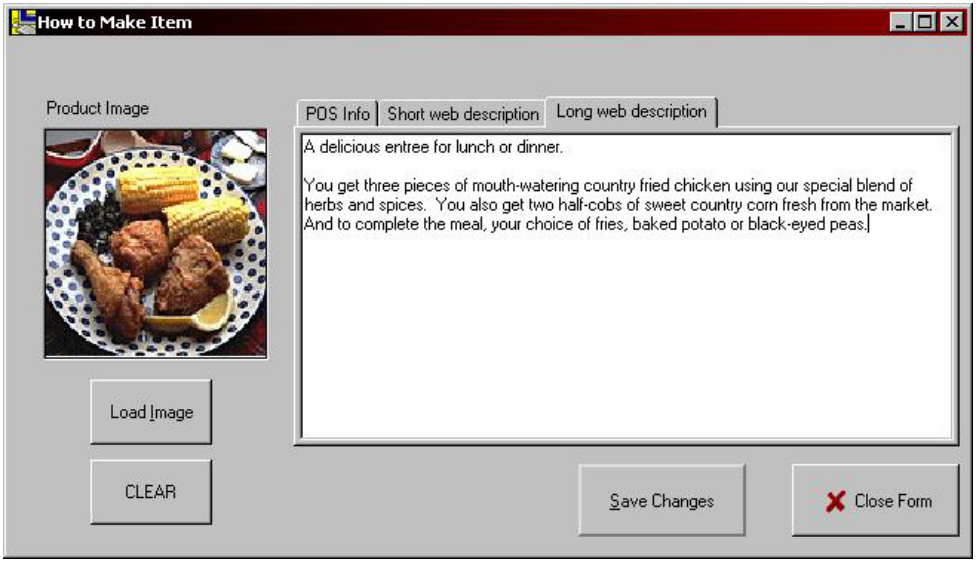


WebToGo Misc Setup

Product Setup

The web menu is separate from the regular menu(s) used in the POS. Using the multi-menu feature, program a separate menu that will be used for WebToGo. Only items that you wish to have available on the Internet will be included in here.

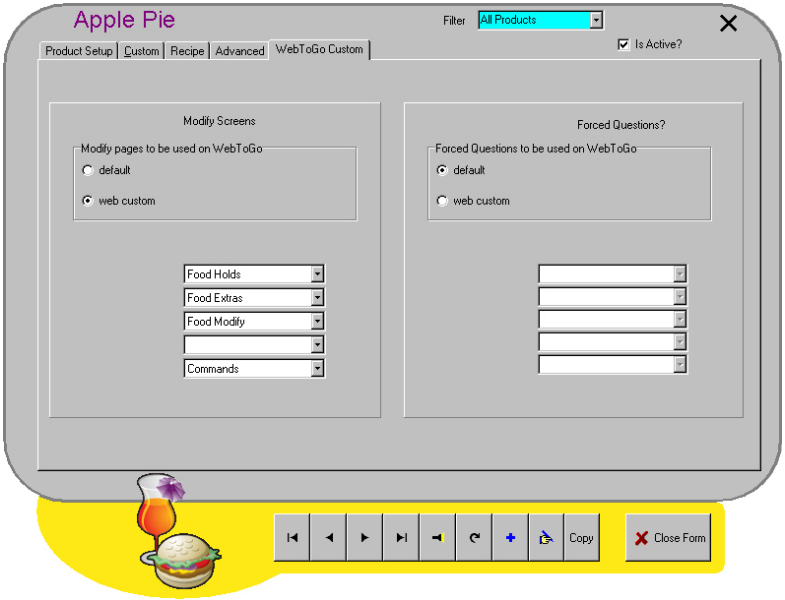
1. Go into System Setup/Products/Multi-Menu and create a separate menu for the Web.
2. Apply all order pages and product items that you want to have available on the Internet to this menu.
3. Go into How To Make for each product item. There are two tabs (short web description and long web description). Put in a description of the product in each and add a graphic (jpeg) image as well.


How to Make Item
Product Image
POS Info
Short web description
Long web description
A delicious entree for lunch or dinner.
You get three pieces of mouth-watering country fried chicken using our special blend of herbs and spices. You also get two half-cobs of sweet country corn fresh from the market. And to complete the meal, your choice of fries, baked potato or black-eyed peas.
Load Image
CLEAR
Save Changes
Close Form

The graphic image does not have to be large or detailed. A simple 50K jpeg image should be sufficient. Keep the images small for quick loading.

1. Go into Administrator/Setup Sales Type. For each type of sale you want to make available (takeout and delivery) check the box that says, “Allow Sale Type on Web”.
2. Install CreditCheck and make sure your methods of payment are adjusted for this.

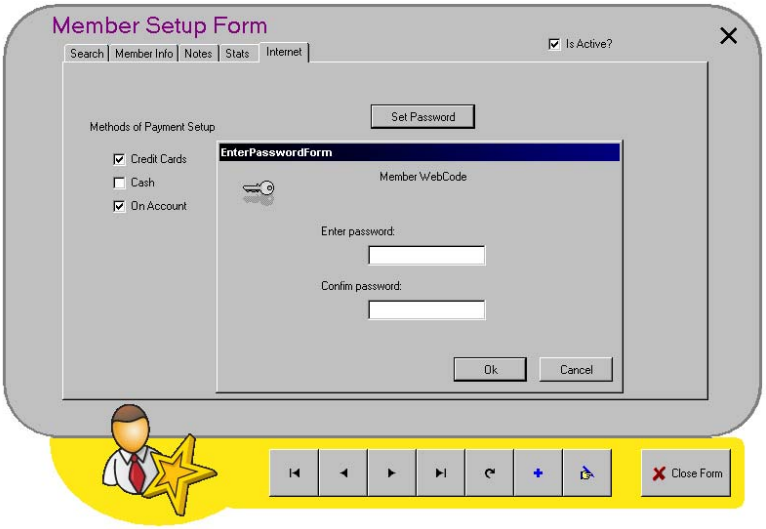
Upon activating the WebToGo feature (as shown in the Internet Setup section earlier), you will find a new tab within Product Setup called WebToGo Custom.



From here, you can apply different modify order pages and forced questions from what is applied within the programming in the regular POS. If you wish to leave it the same for either, leave it checked on default. If you need to override this, select the web custom selection and define which modify screens and/or forced questions you require for a web order of this product.

Member Setup

You can program specific settings for existing web members. With the activation of WebToGo in System Setup, a new tab called Internet will appear in the Member Setup screen.



Methods Of Payment Setup

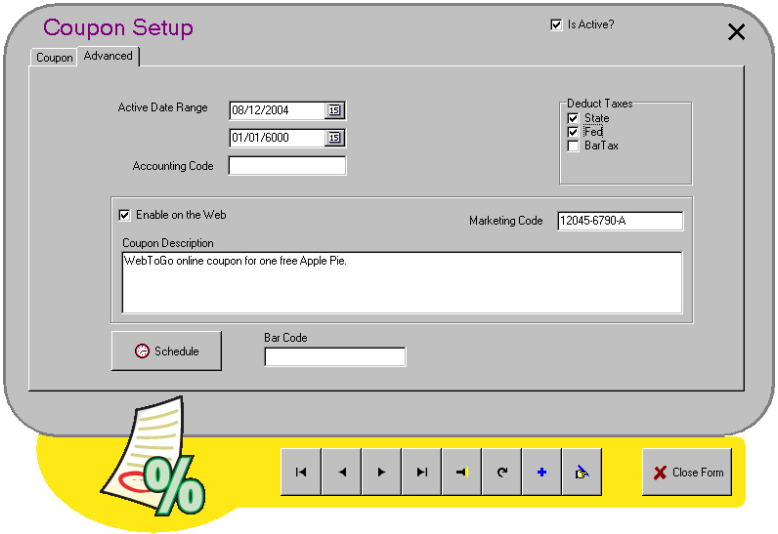
Select the methods of payment you want to allow this member to apply through WebToGo.

Set Password

Rather than allow the member to apply their password within WebToGo, you can assign it for them using this function.

Coupon Setup

On the advanced tab of Coupon setup is an area for applying the coupon for use with WebToGo.



Enable On The Web

Indicates that this coupon is to be made available on a WebToGo system.

Marketing Code

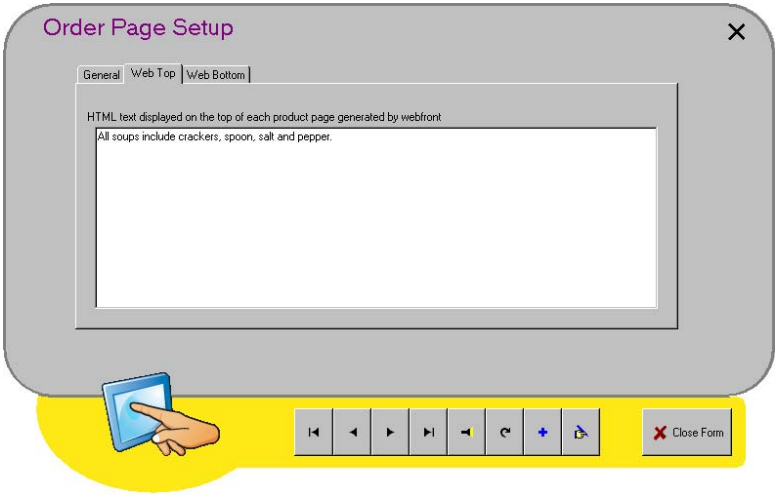
This is used to apply the code via the internet. The code is to be printed on the coupon. Entry of the code applies the coupon to the WebToGo check.

Coupon Description

This displays on the internet when the coupon is selected via WebToGo.

Order Page Setup

Upon activating WebToGo in System Setup, two new tabs will appear in Order Page Setup. Each allow you to apply text that will appear at either the top or bottom of the order page in WebToGo.


Order Page Setup
General
Web Top
Web Bottom
HTML text displayed on the top of each product page generated by webfront
All soups include crackers, spoon, salt and pepper.
Close Form

Web Top

HTML text placed here will display at the top of the menu window upon selecting the order page.

Web Bottom

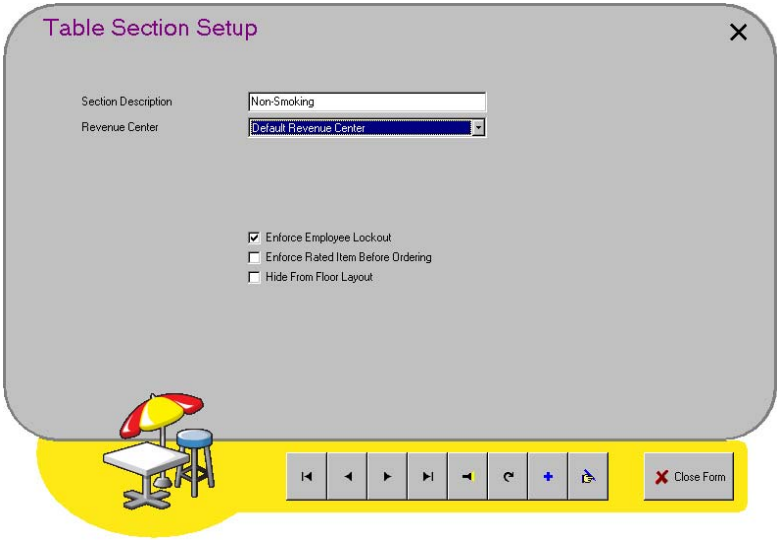
HTML text placed here will display at the bottom of the menu window upon selecting the order page.

Table Setup

Setup Table Sections

Table Setup / Setup Table Sections

Many table service establishments divide their dining area into table sections (such as Smoking and Non-smoking). You set this up here to allow quick navigation to those sections of the Table Layout Screen.



Section Description

Enter the name of the table section. This description will show up in the Sections window on the Table Layout Screen. Selecting the section title will move your display to that dining section.

Revenue Center

You can assign different dining sections to different revenue centers. This would be reflected in your sales and operations reports.

Enforce Employee Lockout

This will prevent other employees from accessing a table once someone has opened a check on it. Un-checking it will allow multiple servers access to the check.

Enforce Rated Item Before Ordering

This ensures that tables within this section cannot accept a food or beverage order if a rated item (rental) has not been ordered first.

Hide From Floor Layout

This removes the table section from the Sections window on the Table Layout Screen. This is used in situations where you may want to remove an outdoor patio during the winter season.

Table Settings

Table Setup / Table Settings

This screen allows you to designate the number of seats, section designation and reservation allowance for each table.

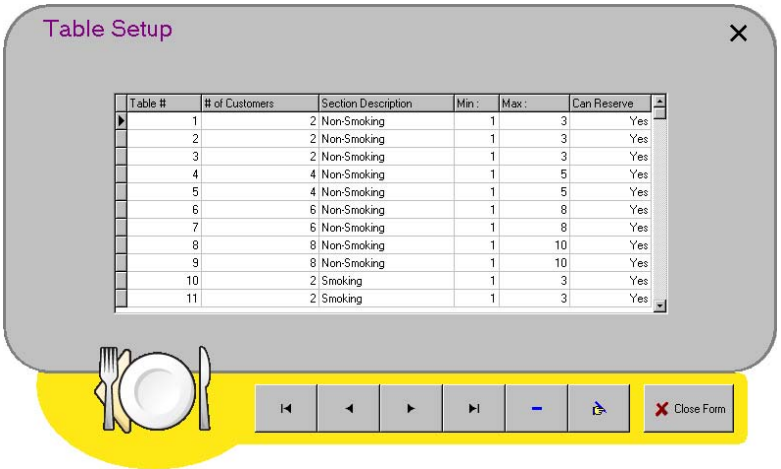


Table Setup
Table # | # of Customers | Section Description | Min : | Max : | Can Reserve
1 | 2 | Non-Smoking | 1 | 3 | Yes
2 | 2 | Non-Smoking | 1 | 3 | Yes
3 | 2 | Non-Smoking | 1 | 3 | Yes
4 | 4 | Non-Smoking | 1 | 5 | Yes
5 | 4 | Non-Smoking | 1 | 5 | Yes
6 | 6 | Non-Smoking | 1 | 8 | Yes
7 | 6 | Non-Smoking | 1 | 8 | Yes
8 | 8 | Non-Smoking | 1 | 10 | Yes
9 | 8 | Non-Smoking | 1 | 10 | Yes
10 | 2 | Smoking | 1 | 3 | Yes
11 | 2 | Smoking | 1 | 3 | Yes
Close Form

Click on any field and apply your changes directly to the field. Clicking on the Section Description field will present a pop down list of the various table sections from which you can choose from. To remove a table from the list, click on the table's record and select the minus (-) button.

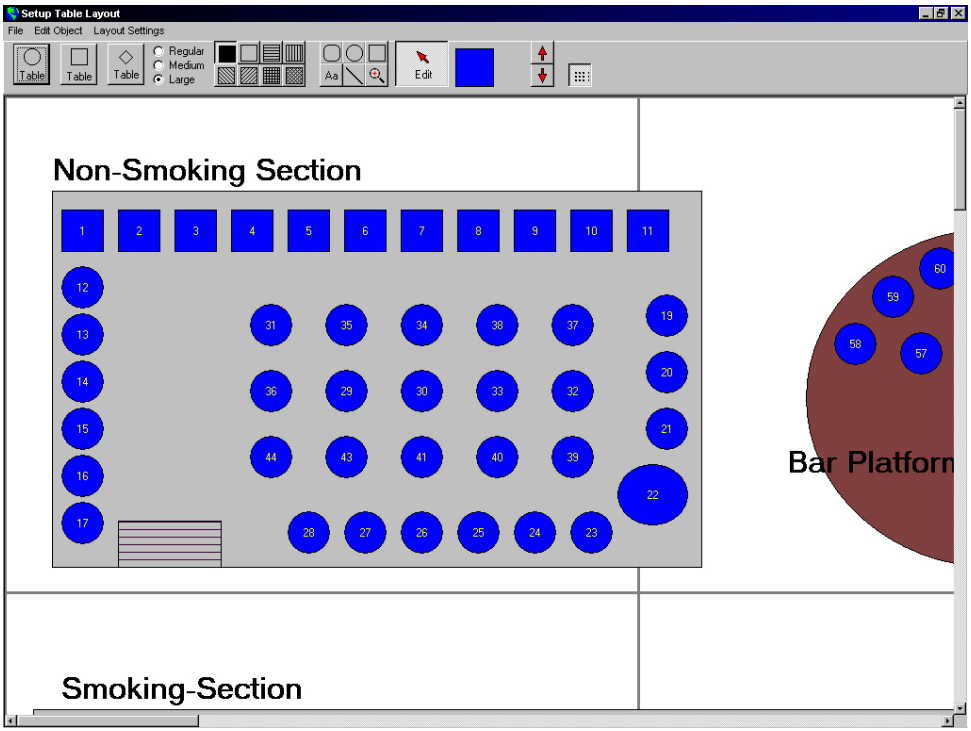
There is no limit to the number of tables you can apply, however certain number ranges have been set aside for specific applications. Table numbers 30,000-32,000 are reserved for quick order table numbers (see Advanced Tab) and 9992999-9995000 for Tab Cards.

Setup Table Layout

Table Setup / Setup Table Layout

The Table Layout screen is a graphic representation of the dining area of the establishment. It is used to allow access to customer checks and employee-related functions.

Setup Table Layout is used to create the floor layout portion of the Table Layout screen. You apply and position the various tables within the establishment, defining their size, shape and number. You can also draw objects such as walls, platforms and dividers to reflect the appearance of the establishment.



Tool Bar

The tool bar is used to apply the tables and objects to the layout.

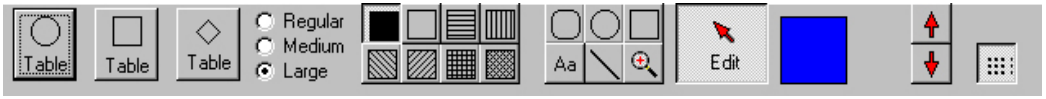


Table Buttons

There are three table buttons; circle, square and diamond. Click-and-drag from any of these buttons onto the floor layout to create a table. Upon releasing the mouse button, a numeric keypad will pop up asking you to give the table a number. Each time you create a table after that, it will automatically increment to the next table number. For example, the first table you apply, you give the number of 1. When the keypad pops up for the next table, it will automatically present a 2. You can change this to any number you wish however.

Table Size Selections

You can standardize table sizes using the Regular, Medium and Large selectors. This will allow you to define pre-set sizes to your tables. You can however resize tables individually (refer to Edit Button).

Object Pattern Buttons

These buttons allow you to apply a pattern to an object. Select the desired object in edit mode (refer to Edit Button), then select the desired pattern you wish to apply to it. Different objects can have different patterns. The default pattern is a solid.

Object Buttons

To the right of the pattern buttons are four object buttons; rounded square, circle, square and straight line. Click on one of these, then perform a click-and-drag on the layout area. The object will be created. When you release the mouse button, the object will lock into place.

Text/Zoom Buttons

Under the Object buttons is a Text Button. Select this then click on the floor layout where you wish the text to go. A text string box will display for you to enter the text. You can change the text size and font by selecting Layout Settings / Layout Font from the top of the screen. The font used for table numbers is pulled from the Medium font setting within Station Setup. The button with the magnifying glass is no longer active.

Edit Button

Selecting the Edit button will put you into edit mode. When in this mode, you can change the size, shape, color and pattern of any object. You can also resize tables as well by applying a click-and-drag to the top left corner of the table, but only in edit mode.

Color Button

The Color button allows you to set the color for the objects. The default color is blue. To change the default color of objects click on it and select new color.

Arrow Buttons

These buttons allow you to layer tables and objects. For example, you create an object that will represent a rug. If applied to an area that contains tables, the object will cover them.

Select [Edit], the object, then down arrow. This will send the object to the back, allowing the tables to appear. The up arrow button will bring the selected object to the forefront. The down arrow will send the selected object to the background.

Snap To Grid Button

When selected, objects and tables are moved within a hidden 10 X10 grid. This option is useful in ensuring objects are aligned properly. When this button is not selected, it means that when you move objects or tables, you will be able to position them freely without being forced to the 10 X 10 grid.

Tagging Tables

You can work with multiple tables at the same time. To do this, you tag them by holding the left CTRL key and clicking each of the tables you want to apply the change to. They will highlight as they are selected. Upon doing this, right-click on one of the tables. A tag menu will display. You can select from any of the following options.

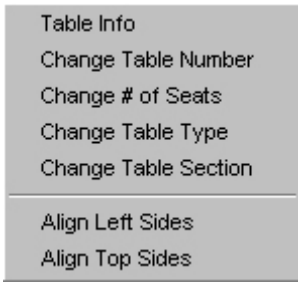


Table Info

This will provide configuration information on each table starting with the lowest table number. It will show the table's number, section and seating capacity.

Change Table Number

This will change the table number of the selected table. If multiple tables have been tagged, the change will be applied to the lowest table number only.

Change # of Seats

This will allow you to change the seating capacity for all selected tables. Upon performing this, all selected tables will have the same number of seats.

Change Table Section

This will toggle all tables from one shape to another. For example, if all selected tables were round, you could change them to square or perform this function again to change them all to diamond shape.

Align Left/Top Sides

Align to the left will use the left-most table as the marker and all selected tables will be moved to the left to be aligned vertically with that table. Align to the top will use the top-most table as the marker and align to that one horizontally.

Lining Up Objects

Select object that you want to line up together by holding the Left Control Key and clicking on items you want to select. Selected items will be displayed in different color, after selecting all the items right click on an object and select Align Left Sides or Align Top Sides.

Sections

Guide Lines

The horizontal and vertical lines on the layout screen are dimension guides. Use these to gauge the size of each dining section layout. You can adjust the area size of these guide lines by selecting Layout Settings / Layout Res from the top of the screen. They can emulate the dimensions of a 640x480, 800x600 or 1024x768 display. You can also set them to a custom dimension or remove them from the layout screen. In any case, they will not show up on the floor layout at the front end.

Section Markers

You have created the table layout and now want to assign the various sections to their respective dining sections. Go to the middle of one of the sections and double-click. A section marker window will display. Select the desired dining section. At the front end, when you select the dining section from the Table Layout screen, you will be taken to that particular area on the floor layout.

Background

Color

The background color of the floor layout is white. You can change the color of this by selecting Layout Settings / Floor Color. A color template will display from which you can select a color.

Image

You can place a graphic image in the background to represent the layout of the establishment, texture of flooring or company logo. The process is as follows:

- Create or download the desired image. Make sure it is in a jpeg format and the size matches (or closely matches) your layout dimensions.
- Copy the file to the \PixelPOS folder.
- Rename the image to **floorlayout.jpg**

The file will be applied automatically. You can turn this off either by renaming the file or selecting Layout Settings / Display Background within Table Layout Setup.

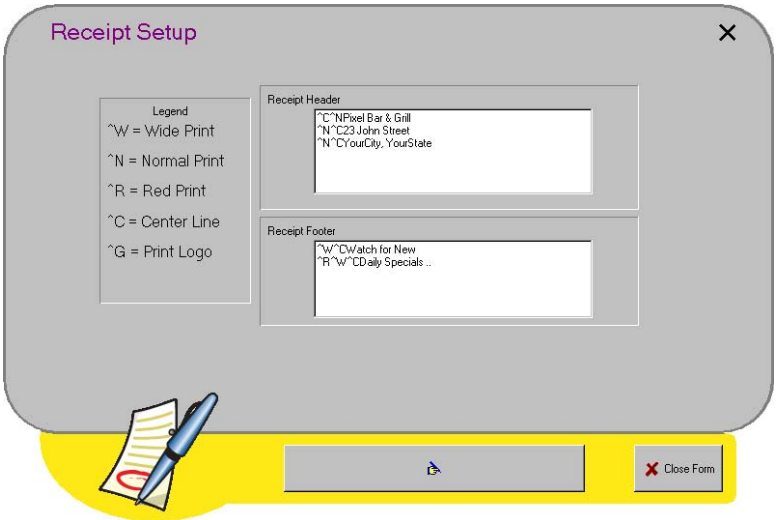
The jpeg image is separate from the table layout file (which is an flr file in \PixelPOS). When you go into Setup Table Layout, the image will appear automatically and can be applied to any flr file. The floor file contains the layout of the tables and objects which lay over top of the jpeg image.

General Setup

Setup Receipt

General Setup / Setup Receipt

This is where you set up the header and footer to the establishment's receipts.



The legend identifies the different codes that can be applied to each line. The code for Print Logo requires that (1) the receipt printers are capable of retaining a graphic image and (2) the print string of the graphic image has been applied within Setup Printer Codes.

Receipt Header

Contains the graphic indicators and text that appears at the top of the receipt.

Receipt Footer

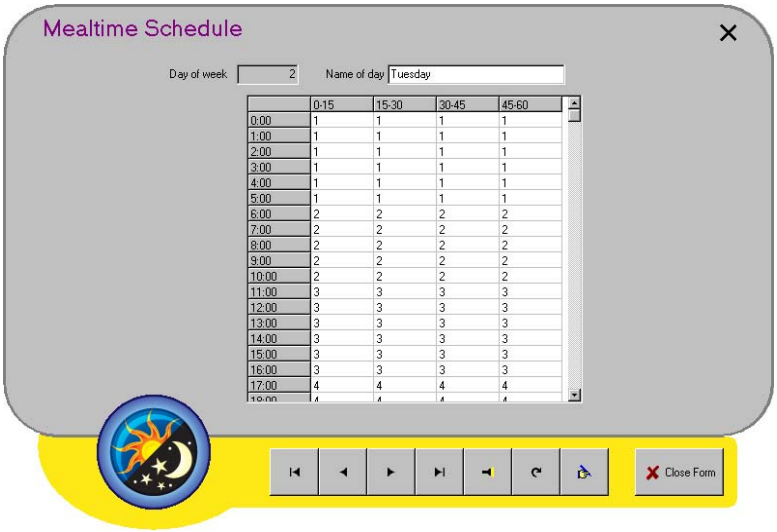
Contains the graphic indicators and text that appears at the bottom of the receipt.

Note: This receipt setup is for the master receipt that applies to the entire POS. You can override this with a different receipt header/footer within Administrator \ Setup Stations \ Receipt Setup Tab.

Mealtime Setup

General Setup / Mealtime Setup

Mealtime allows you to designate sale times to different time periods. This allows you to compare and gauge activities among each period. For example, you could define the Breakfast Mealtime as being 6:00am-11:00am. This will allow you to generate a mealtime report identifying sales revenue generated during the breakfast period.



Day Of Week

Each day is assigned a number within the database.

Name Of Day

You define which day will be Day1, Day2... and so on. This is reflected in your reports.

Cell Titles

The vertical cell titles (1:00, 2:00, 3:00...) represent the 24 hour intervals within the day. The horizontal cell titles (0-15, 15-30...) represent 15 minute intervals within the hour. For example, the cell in row 13:00, column 30-45 would represent 1:30pm-1:45pm.

Cell Contents

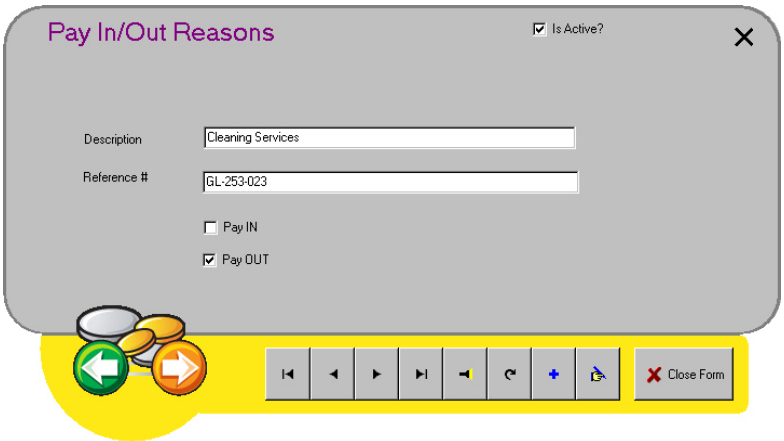
All cells are defaulted to Mealtime 1. This means that a mealtime report would group all sales into a single period that encompasses the entire day. Changing a cell to a 2, 3, 4... will separate the sales activities from period 1. You can apply up to 9 mealtimes per day. The mealtimes can vary from day to day.

Pay In/Out Reasons

General Setup / Pay In/Out Reasons

A pay-in is money accepted outside of a conventional transaction. For example, someone pays money into the till for a deposit or debt owed. A pay-out is money that is paid out for something not associated with a conventional transaction. For example, the server pays money out of the till for supplies or services.

Pay in/out reasons are used to categorize the pay-ins and pay-outs into pre-set reasons. When applying one or the other, the system will prompt you to select one of these reasons.



Description

Enter the description of the reason.

Reference

This field is for reporting purposes only. You can place a reference code in this field such as a general ledger account code.

Pay In / Pay Out

Checking either box will allow the reason to appear in the list of reasons for that pay type.

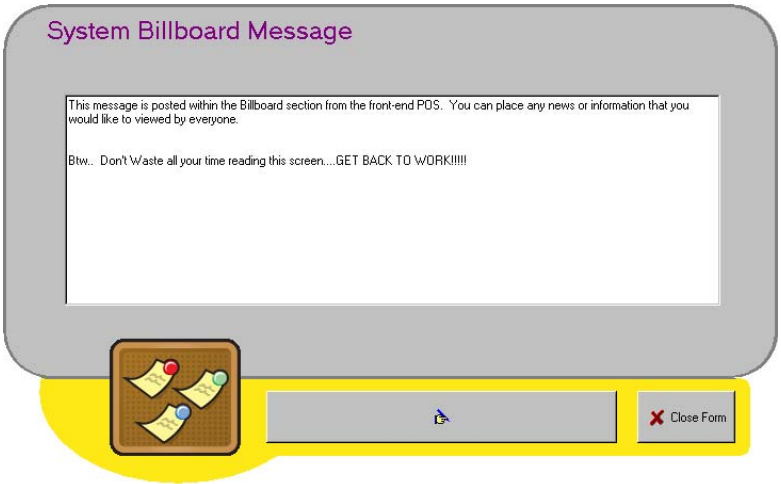
Open Cash Drawer

Determines whether to open the cash drawer if that reason is selected.

Setup Billboard Message

General Setup / Setup Billboard Message

When [Billboard] is selected on the Table Layout screen, it will display three windows identifying Specials, Desserts and Sold Out items. But above that is a billboard message window that would contain a message(s) that would be pertinent to all staff. It is here that you program the message window.


System Billboard Message
This message is posted within the Billboard section from the front-end POS. You can place any news or information that you would like to viewed by everyone.
Btw.. Don't Waste all your time reading this screen....GET BACK TO WORK!!!!!
Close Form

You can use your mouse and keyboard to edit the text within this window. The change will be applied immediately to the stations. If a user is currently logged in when this message is saved, it will not appear until the user has logged out then back in.

Banner Message

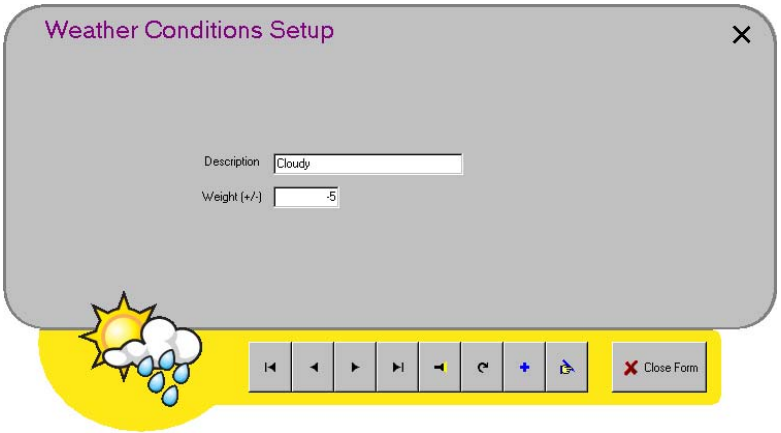
General Setup / Banner Message

A pole display unit displays transaction information on a small LCD or CRT window, allowing the customer to view the total and change due. This is the text that displays in the window when the station is not currently engaged in a transaction.

Weather Conditions

General Setup / Weather Conditions

Weather conditions can be applied to the End Of Day report to help explain revenue totals (or lack of totals) for outdoor dining sections, such as a patio. It is here that you define the different types of weather conditions and adjust their weight value.



Description

The description of the weather condition.

Weight (+/-)

A numeric value which can be positive or negative, that would explain the severity of the type of weather. A negative value should be applied to poor weather and a positive value applied to good weather.

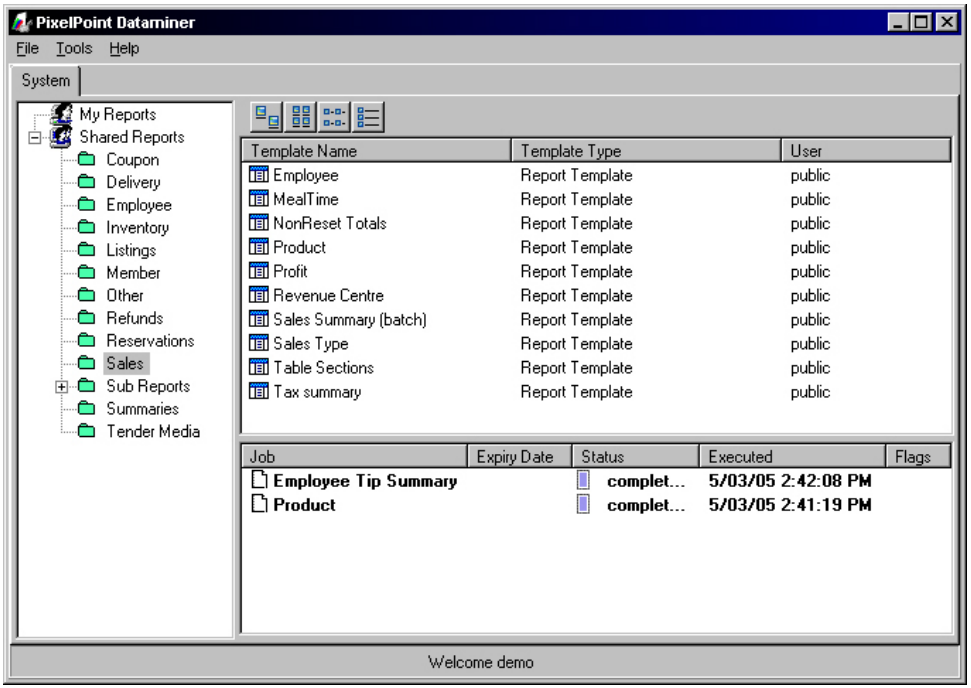
DataMiner Client

General Setup / DataMiner Client

DataMiner is available within BackOffice under the General Setup pull-down menu. You can also add the icon to the yellow bar if you wish.

Upon running DataMiner Client, you log as you would into BackOffice.

The screen is divided into three windows. The first, on the left, is the **Folder Window**. It displays the folders referring to the various applications within the POS system. The upper-right window is the **Template Window**. As you select a folder, the corresponding report templates display here. Select one of these titles to generate a report. The final section is the **Task Window** in the lower right of the screen. It displays the report tasks that have been run. You can view the status of a report as it is being compiled and upon completion, double-click the report task to view the results.



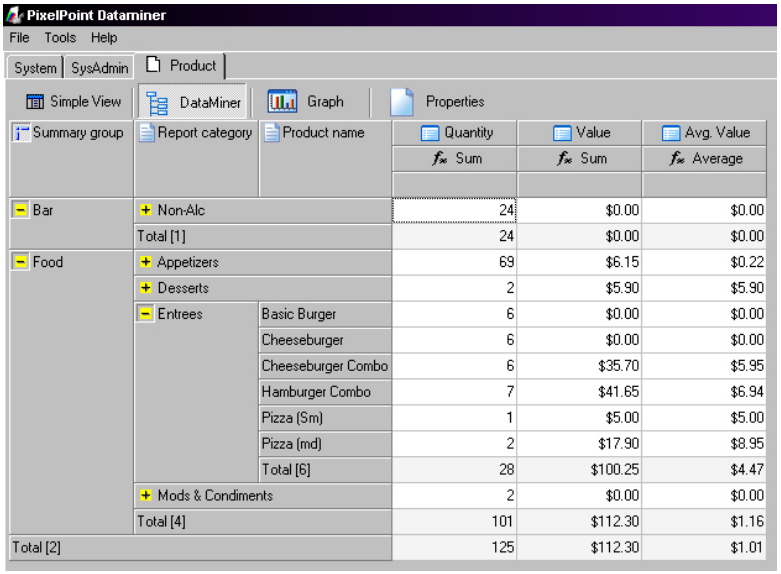
To run a report, double-click on the desired report in the template window. You may be prompted for a date range or some other information. Upon filling in the required information, select Run.

When the report is completed, the compiled result will automatically display on the screen. It will also be added as a line entry into the Task Window for later viewing. In that case, double-click on the print job to view the report.

When the report is displayed, you will be presented with several tab views of the report.

DataMiner Tab

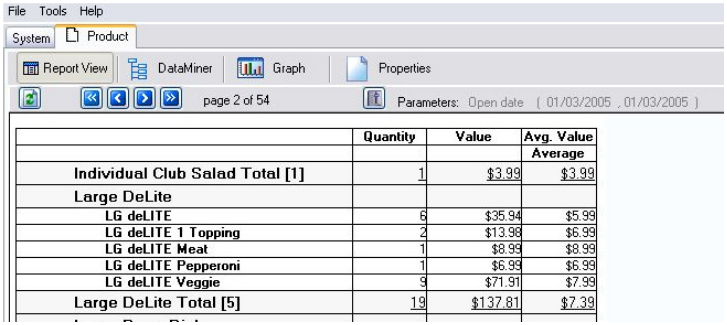
The default tab will display the report grid. To mine down, select the [+] icon next to the title. You can sort any of the columns by clicking on its title cell.



Summary group	Report category	Product name	Quantity Sum	Value Sum	Avg. Value Average
− Bar	+ Non-Alc		24	$0.00	$0.00
	Total [1]		24	$0.00	$0.00
− Food	+ Appetizers		69	$6.15	$0.22
	+ Desserts		2	$5.90	$5.90
	− Entrees	Basic Burger	6	$0.00	$0.00
		Cheeseburger	6	$0.00	$0.00
		Cheeseburger Combo	6	$35.70	$5.95
		Hamburger Combo	7	$41.65	$6.94
		Pizza (Sm)	1	$5.00	$5.00
		Pizza (md)	2	$17.90	$8.95
		Total [6]	28	$100.25	$4.47
	+ Mods & Condiments		2	$0.00	$0.00
	Total [4]		101	$112.30	$1.16
Total [2]			125	$112.30	$1.01

Simple View Tab

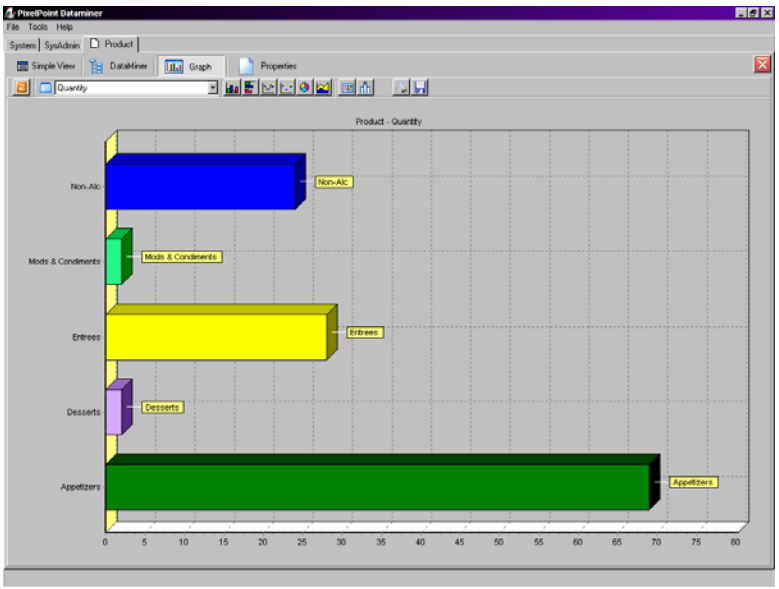
This will take the information displayed on the DataMiner tab and transpose it into a refined view that presents the data in a simpler format.



	Quantity	Value	Avg. Value
			Average
Individual Club Salad Total [1]	1	$3.99	$3.99
Large DeLite			
LG deLITE	6	$35.94	$5.99
LG deLITE 1 Topping	2	$13.98	$6.99
LG deLITE Meat	1	$8.99	$8.99
LG deLITE Pepperoni	1	$6.99	$6.99
LG deLITE Veggie	9	$71.91	$7.99
Large DeLite Total [5]	19	$137.81	$7.39

Graph Tab

This tab will apply the displayed criteria in a graph format. The contents of the graph are pulled directly from whatever is displayed on the DataMiner tab.

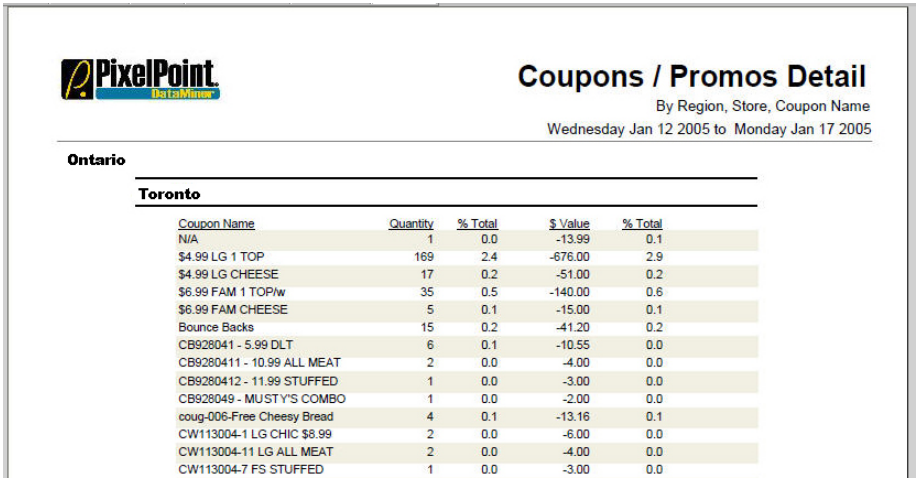


Properties Tab

This tab will present overview information about the report. To view this information, select the book icon corresponding with the title on the left to show detailed information about the report. This information will include user's notes/comments about the report, the report date ranges, data descriptions and results information such as field types, formats and forms of calculations applied to the report.

Report View Tab

Some reports offer this tab. It is a pre-formatted view of the report, much like the types of reports created in Report Viewer.



PixelPoint DataMiner

Coupons / Promos Detail

By Region, Store, Coupon Name

Wednesday Jan 12 2005 to Monday Jan 17 2005

Ontario

Toronto

Coupon Name	Quantity	% Total	$ Value	% Total
N/A	1	0.0	-13.99	0.1
$4.99 LG 1 TOP	169	2.4	-676.00	2.9
$4.99 LG CHEESE	17	0.2	-51.00	0.2
$6.99 FAM 1 TOP/w	35	0.5	-140.00	0.6
$6.99 FAM CHEESE	5	0.1	-15.00	0.1
Bounce Backs	15	0.2	-41.20	0.2
CB928041 - 5.99 DLT	6	0.1	-10.55	0.0
CB9280411 - 10.99 ALL MEAT	2	0.0	-4.00	0.0
CB9280412 - 11.99 STUFFED	1	0.0	-3.00	0.0
CB928049 - MUSTY'S COMBO	1	0.0	-2.00	0.0
coug-006-Free Cheesy Bread	4	0.1	-13.16	0.1
CW113004-1 LG CHIC $8.99	2	0.0	-6.00	0.0
CW113004-11 LG ALL MEAT	2	0.0	-4.00	0.0
CW113004-7 FS STUFFED	1	0.0	-3.00	0.0

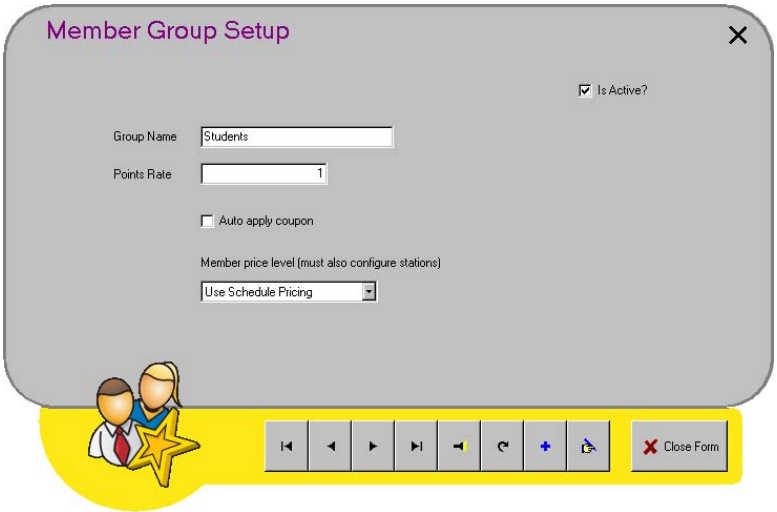
Further information regarding DataMiner Version 4 will be found in the forthcoming DataMiner manual.

Members/VIP

Setup Member Groups

Members/VIP / Setup Member Groups

Members can be categorized into groups. These groups can react differently in the POS based on how they are programmed here.



Group Name

Name of the member group.

Points Rate

Points can be applied to products. When a member is assigned to a check, all points accumulated on that order will be applied to the member record. Within Coupon Setup you can create member incentive rewards that require the redemption of accumulated member points.

Points rate allows you to set different rates of accumulation to each group. This then allows you to define different types of incentive programs appropriate to the different types of groups. For example, Group #1 has a points rate of 1, meaning a 10 point item is worth 10 points. Group #2 has a points rate of 5, meaning a 10 point item is worth 50 points.

Applying this to the establishment, Steak is worth 10 points. There are two incentive programs defined in Coupon Setup. The first offers a $10 discount in exchange for 100 points. The second offers an expensive watch in exchange for 1,000 points. A member from Group #1 would be able to achieve the discount but would (in all practicality) find the second incentive unattainable. Yet the member of Group #2 could achieve the 1,000 points required

for the watch. This is because Group #2's points are being accumulated 5 times faster than Group #1.

Auto Apply Coupon

Checking this box will display a window allowing you to select a coupon. In selecting this, the coupon will be automatically applied when a member from this group is applied to the check.

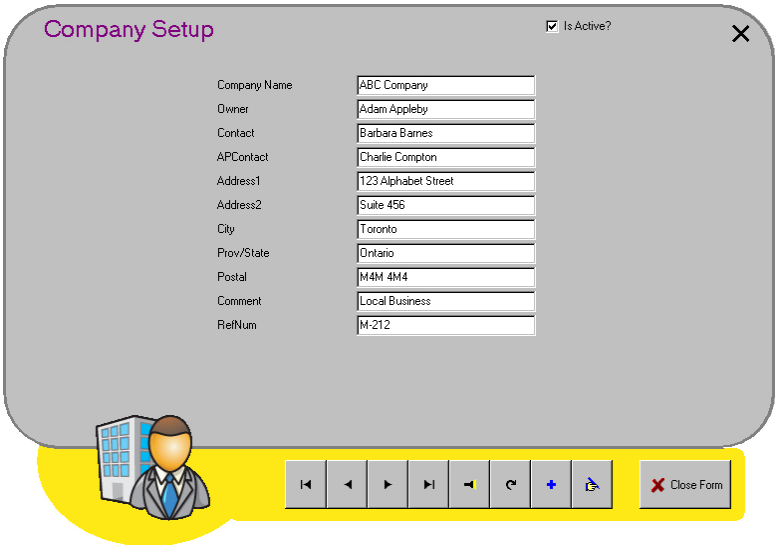
Member Price Level

This is one of the ways you can apply pricing levels to the system. From this field, you can force different price levels to different member groups. For example, a hamburger may be price differently if ordered by a conventional customer, a Student member and a VIP member. If different price levels are applied within here, you must also configure price levels in Station Setup to indicate which stations will honor this setting.

Setup Companies

Members/VIP / Setup Companies

Members can be applied to a company record. In doing this, the establishment can invoice the company for employee purchases. The invoice is a report available in Report Viewer. It will include information from this screen.



Upon creating this record, the company can be applied to member records.

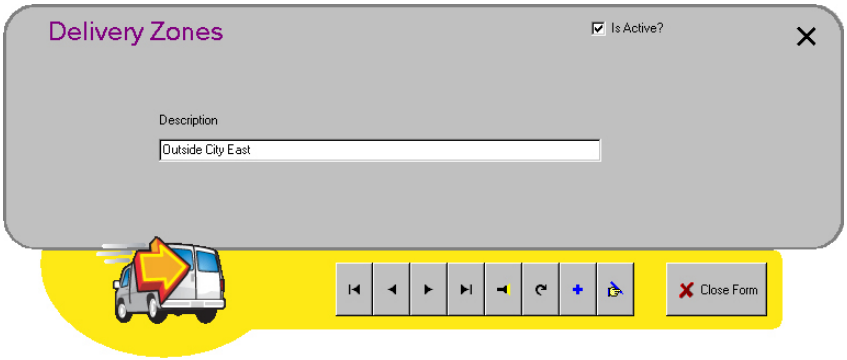
RefNum

This is a reference number for reporting purposes.

Setup Delivery Zones

Members/VIP / Setup Delivery Zones

You can create the different delivery zones for the establishment. This allows the order taker to assign members to geographic regions which will aid in the allocation of delivery orders.

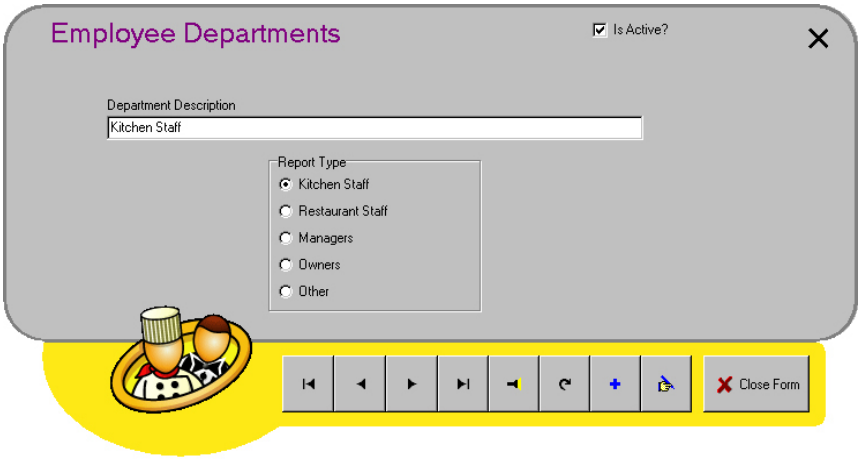


Employees

Setup Departments

Employees / Setup Departments

Employees are allocated to departments. It is here that you create the different departments.



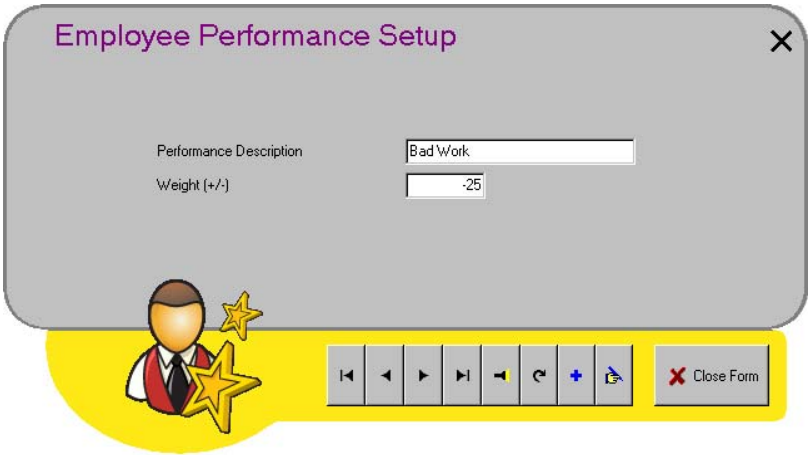
Report Type

Select one of the report types that best matches the department. When you generate a Departmental report, all departments with a matching report type will be grouped together to present a collective total.

Employee Performance Points

Employees / Employee Performance Points

If management receives a compliment or complaint regarding an employee's performance, this can be noted within the system with either a positive or negative point value tagged onto it. Upon applying performance points, the employee is automatically notified that they received a good or bad performance rating. This information is retained in the system and available for review in the form of a report.



Performance Description

Enter a description of the performance for awarding or removing Employee Points.

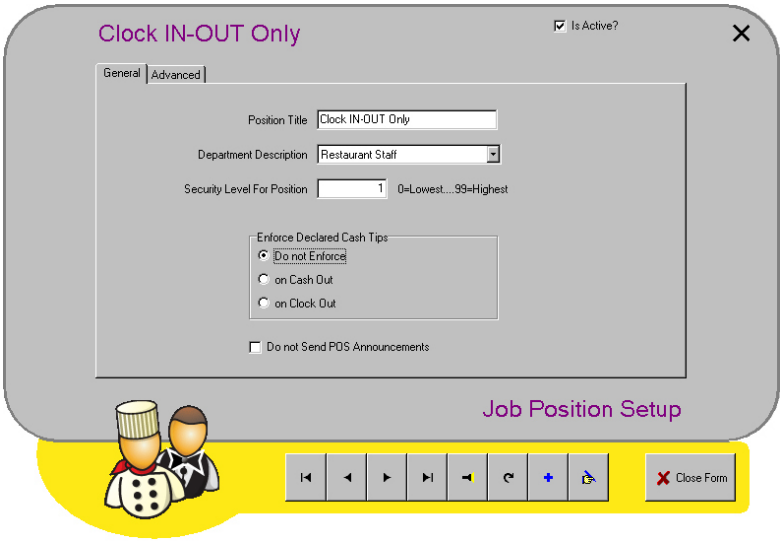
Weight (+/-)

A numeric value (positive or negative) which relates to the Performance Description that indicates whether to add or remove employee points for this type of performance.

Setup Job Positions

Employees / Setup Job Positions

Before adding employees, you need to set up job positions. Default job positions have already been created however, you can change or create new ones to suit your needs.



Position Title

Name of the job position.

Department Description

Select the department this position belongs to.

Security Level For Position

A numeric value that represents the authority available to this position. The higher the number, the greater the authority this position holds.

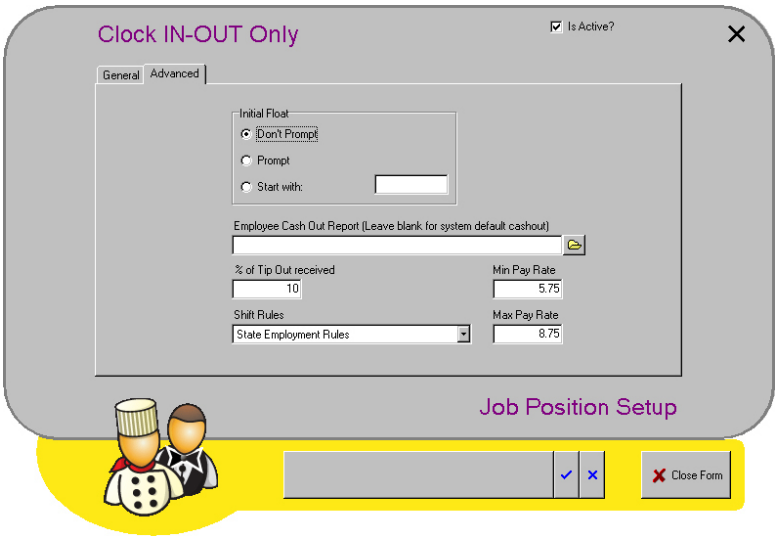
Enforce Declared Cash Tips

Use this to force employees with this job position to declare their cash tips.

- Do Not Enforce - Prevents the prompt for tip declaration.
- On Cash Out - Forces a prompt for tip declaration when the employee cashes out.
- On Clock Out - Forces a prompt for tip declaration when the employee clocks out.

Do Not Send POS Announcements – There is a check box called 'Do Not Send POS Announcements'. This will prevent messages such as Sold Out / Sold In from coming across to people in this job position.

Advanced Tab



Initial Float

- Don't Prompt - Prevents the prompt for float declaration.
- Prompt - Forces a prompt for float declaration when the employee clocks in.
- Start With - Automatically declares a float in the amount indicated within the adjoining field.

Employee Cash Out Report

This allows you to apply a cash out report specific to this job position. For example, if the establishment uses cashiers, the regular cash out report would show zero values on the servers' reports. This is because *the person who closes the check gets credit for the sale*, which in this case would be the cashier. Changing the cash out report for servers' job position to show sales based on Employee Who Started would then allow you to see their activity.

% Of Tip Out Received

Some establishments pool their tips and at the end of the day, divide the collective tips among the various workers. This is referred to as a Tip Pool. If doing this, enter the percentage this job position would receive of that pool.

Tip Pooling

All tips are gathered and counted. Run the Tip-Out Report which will prompt you for that total amount. The report will take that amount and divide it into the percentages defined within the job positions. For example, if [% Of Tip Out Received] is set to 25% for the Bartender job position, then the bartenders will share 25% of the tip pool. The report will then break down

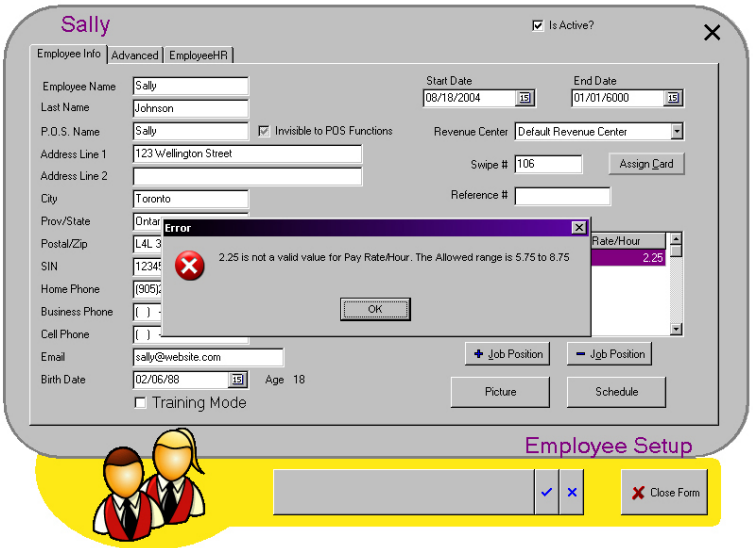
that amount based on the hours worked. For example, if Tom worked 8 hours, Sue worked 2 hours and Fred didn't work that day, then Tom will get 80%, Sue will get 20% and Fred will get 0% of the bartender portion.

Shift Rules

This allows you to determine which set of shift rules will apply to this job position. This setting can be overridden at the Employee level within Employee Setup. For further information regarding the information affected by this, refer to the Shift Rules section.

Min/Max Pay Rate

This allows you to apply a minimum and maximum allowable pay rate to this job position.

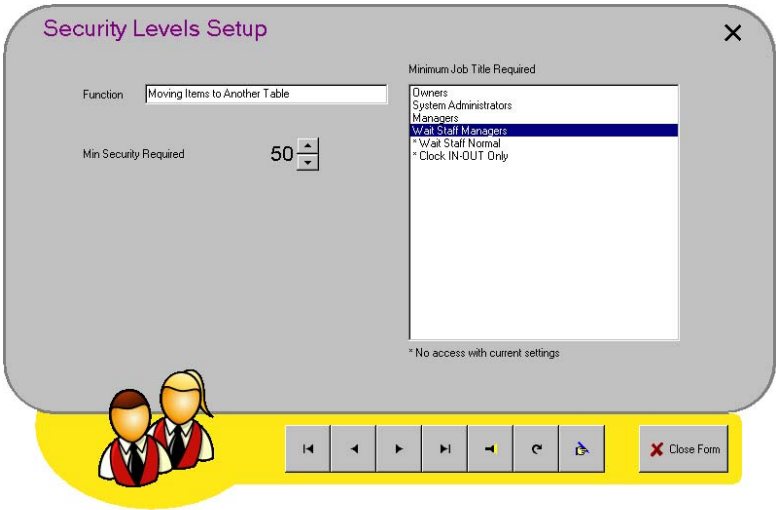


Within Employee Setup, these settings will prevent employee wages from being set outside of the designated parameters.

Setup Security Levels

Employees / Setup Security Levels

This area addresses the application of security levels to all major functions of the POS. Though security can be applied in other areas (such as Methods of Payment and Coupon Setup), everything pertaining to granting access to secured functions and applications is set through here.



Function

Description of the function. If you select the flashlight icon in the navigation bar, it will display a search screen showing all of the different functions that can be set within here.

Minimum Security Required

Click on either the up arrow or down arrow to set the security level required for this function. The security levels are set by default to levels 1, 25, 50, 75 and 99. However additional numbers can be applied through Job Position Setup.

Minimum Job Title Required

This list shows what job positions will be eligible to perform the displayed function. As you change the settings for Minimum Security Required, the applicable job titles will change as well. Those with an asterisk next to the name will not have access to the displayed function.

Security Level Definitions

A/R Module For Accounts	n/a
Access To All Tables	Access to Another Person's Table
Access To Any Table	Access to Any Table on the Floor Layout
Access To Authorization Manager	Access to Authorization Manager within Manager
Access To Changing Cash Drawer	Access to Cash Drawer within Your Settings
Access To Employee Settings	Access to Employee Functions within Manager
Adding Products	Ability to add Products within BackOffice
All Employee Time Clock	Access to Employee Time Clock within Manager
Bar Interface Manager	Access to Bar Interface within Manager
Cash Out Employee	Access to Cash Out within Your Settings
Change Employee Interface	Access to System Interface within Your Settings
Change PunchClock Times	Access to Punch Clock within Manager/BackOffice
Charge Gratuity	Access to Charge Gratuity within Functions
Clocking In Employee Self	Ability to Clock In without management authorization
Clocking Out Employee Self	Ability to Clock Out without management authorization
Closing Special Function	n/a
Closing Tables	Access to Finish
Credit (PayOut)	Access to Pay Out within Your Settings
Deposits (Cash Drop)	Access to Pick Up within Your Settings
Selling In Items	Access to Sold In within Manager/Billboard
Selling Out Items	Access to Sold Out within Manager/Billboard
Setting CountDown	Access to Item Countdown within Manager
Setting Employee Access	Access to Set Employee Access Card within Manager
Settling Charges	Access to Settle All Charges within Manager
Setup: Access Collaboration	Access to Collaboration Setup within BackOffice
Setup: Banner Message	Access to Banner Setup within BackOffice.
Setup: Billboard Message	Access to Billboard Setup within BackOffice
Setup: Coupons	Access to Coupon Setup within BackOffice
Setup: Employee Performance Points	Access to Performance Points Setup within BackOffice
Setup: Exit Setup	Access to Exit Setup within BackOffice
Setup: Forced Questions	Access to Forced Questions Setup within BackOffice
Setup: Internet Setup	Access to WebToGo Setup within BackOffice
Setup: Item Category Setup	Access to Report Category Setup within BackOffice
Setup: MealTime Setup	Access to Meal Time Setup within BackOffice
Setup: MultiMenu Setup	Access to MultiMenu Setup within BackOffice
Setup: Order Page Setup	Access to Order Page Setup within BackOffice
Setup: Order Templates	Access to Order Template Setup within BackOffice
Setup: Pay In/Out	Access to Pay In/Out Reasons Setup within BackOffice

• Easy-Add POS Item	Access to Easy Add New Item within Functions
• Employee Performance Bad	Access to Poor Performance within Functions
• Employee Performance Good	Access to Good Performance within Functions
• Employee Schedule	Access to Employee Schedule within Manager
• Employee Till Assignment	Ability to override Till Assignment
• Exit POS Software	Access to Exit POS Software within Manager
• Fractional Ordering	Ability to order non-integer quantity values within [@1]
• Inv Manager: Access	Access to Inventory Manager within BackOffice
• Inv Manager: Change PO	Access to Change PO within Inventory Manager
• Inv Manager: Delete PO	Access to Delete PO within Inventory Manager
• Inv Manager: Input Stock	Access to Input Stock within Inventory Manager
• Inv Manager: New PO	Access to New PO within Inventory Manager
• Inv Manager: Physical Counts	Access to Physical Counts within Inventory Manager
• Inv Manager: Purchase Orders	Access to Purchase Orders within Inventory Manager
• Inv Manager: Receive PO	Access to Receive PO within Inventory Manager
• Inv Manager: Setup Recipes	Access to Setup Recipes within Inventory Manager
• Inv Manager: Stock Levels	Access to Stock Levels within Inventory Manager
• Inv Manager: Transfers	Access to Transfers within Inventory Manager
• Joining Tables	Access to Move Tables for joining within Functions
• Manual Card Entry	Ability to manually enter an Employee Card Number

Reasons	
• Setup: Payment Adjustment Reasons	Access to Pay In/Out Reasons within BackOffice
• Setup: POS Functions Setup	Access to POS Functions Setup within BackOffice
• Setup: Price Change	Access to Price Change within BackOffice (HeadOffice)
• Setup: Product Setup	Access to Product Setup within BackOffice
• Setup: Receipt	Access to Receipt Setup within BackOffice
• Setup: Refund Reasons	Access to Refund Reasons Setup within BackOffice
• Setup: Regions Config	Access to Regions Setup within BackOffice (HeadOffice)
• Setup: Send Mail	Access to Send Mail within BackOffice
• Setup: Setup Companies	Access to Member Company Setup within BackOffice
• Setup: Setup Delivery Zones	Access to Delivery Zone Setup within BackOffice
• Setup: Setup Departments	Access to Departments Setup within BackOffice
• Setup: Setup Employees	Access to Employee Setup within BackOffice
• Setup: Setup Job Positions	Access to Job Position Setup within BackOffice
• Setup: Setup Member Groups	Access to Member Group Setup within BackOffice
• Setup: Setup Members	Access to Member Setup within BackOffice
• Setup: Setup Network Printers	Access to Network Printers Setup within BackOffice
• Setup: Setup Payment Methods	Access to Payment Methods Setup within BackOffice
• Setup: Setup Printer Channels	Access to Printer Channel Setup within BackOffice
• Setup: Setup Printer Codes	Access to Printer Codes Setup within BackOffice
• Setup: Setup Revenue Centers	Access to Revenue Center Setup within BackOffice

Manually Entered Credit Card	Ability to manually enter a Credit Card Number
Manually Entered Member Card	Ability to manually enter a Member Card Number
Moving Items To Another Table	Access to Move Items within Functions
Moving Tables	Access to Move Tables within Functions
Negative Final Total	Ability to settle with a Negative Final Total
No Sale Transaction Closing	Ability to settle to a zero dollar value
Ordering Products	Ability to order products
POS: Add New Member	Access to Add Member within Functions
POS: Member/Delivery	Access to Member/Delivery within Functions
POS: No Tax Button	Ability to apply No Tax within Finish
POS: Reorder Button	Access to Reorder within Function
Post Inventory Usage	Access to Post Inventory Usage within Function
Printer Manager	Access to Printer Manager within Manager
Printing Receipts	Ability to apply the Print Receipt button
Quick Order Access	Ability to apply the Quick Order button
Re-Cashout Employee	Ability to perform a Cashout more than once
Re-Print Checks	Ability to Reprint a Check/Receipt
Receivables (PayIn)	Access to Pay In within Your Settings
Release Station Employee Lock	Ability to override Employee Lockout on multiple stations
Rep Svr: Config Report Server	Ability to modify Report Server
Rep Svr: Global Tree Mgt	Ability to modify the Global report Tree within DataMiner

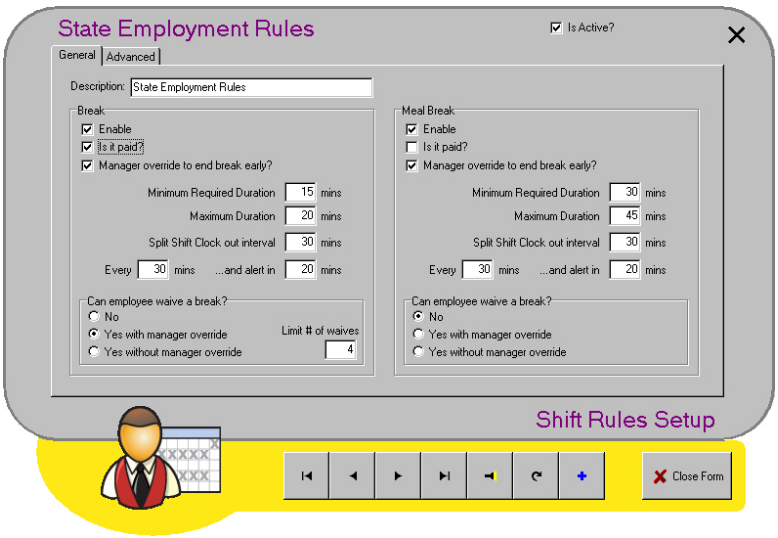
Setup: Setup Sales Type	Access to Sales Type Setup within BackOffice
Setup: Setup Security Levels	Access to Security Levels Setup within BackOffice
Setup: Setup Stations	Access to Station Setup within BackOffice
Setup: Setup System	Access to Setup System within BackOffice
Setup: Stock Adjustment	n/a
Setup: Stocked Items	Access to Stock Item Setup within BackOffice
Setup: Stores Config	Access to Store Setup within BackOffice (HeadOffice)
Setup: Summary Group Setup	Access to Summary Group Setup within BackOffice
Setup: Supplier Setup	Access to Supplier Setup within BackOffice
Setup: System Setup	Access to System Setup within Manager
Setup: Table Layout	Access to Table Layout Setup within BackOffice
Setup: Table Sections	Access to Table Sections Setup within BackOffice
Setup: Table Settings	Access to Table Settings within BackOffice
Setup: Time-Clock Manager	Access to Time-Clock Manager within BackOffice
Setup: View Response Mail	Access to View Response Mail within BackOffice
Setup: Warehouse Setup	Access to Warehouse Setup within BackOffice
Setup: Weather Conditions	Access to Weather Conditions Setup within BackOffice
Shut Down System For Day	Access to Day: Finish Sales within Manager
Shut Down Windows Environment	Access to Shut Down System within Manager
Splitting Checks	Access to Split Check within Functions
Starting/Ending Rated Products	Ability to order Rated Items & access Stop All Timers within Functions

• Rep Svr: Report Management	Ability to modify reports within DataMiner
• Rep Svr: Run Report	Ability to run reports within DataMiner
• Rep Svr: Tree Management	Ability to modify your personal report Tree within DataMiner
• Reports	Access to Report Viewer
• Reservation	Access to Reservations within Manager
• Retip	Ability to apply a Charge Tip more than once
• Return/Exchange Items	Access to Return/Exchange Items within Functions
• Schedule Future Order	Ability to Schedule a Future Order on a member order
• System Setup	Ability to access BackOffice
• Tender Settlement - Cash Out	Ability to perform a Tender Balance on Cashout
• Tender Settlement - EOD	Ability to perform a Tender Balance on End Of Day
• Training mode On/Off	Ability to place an employee in/out of Training Mode
• Transaction Viewer	Access to Transaction Viewer within Manager
• Transfer Table Ownership	Ability to Transfer Check/Transfer All Checks
• Un-Close Check	Ability to Unclose a Check
• View Current Day Sales	Access to View Current Day Sales
• View Guests	Access to Who Is Here on the Table Layout screen
• Void Items Before Print	Ability to perform a Void before sending
• Your Transactions View	Access to Transaction Viewer within Your Settings

Shift Rules

Employees / Shift Rules

This section allows you to set shift parameters and save them as a set of rules. You can create multiple sets of Shift Rules and apply them globally through Setup System, to a specific group of employees through Job Position Setup, or to individuals through Employee Setup.



Description

This is the description or title of this set of rules. When saved, you will reference this set of rules by the Description field.

Break Enable

If checked, you will be able to set and apply the rules pertaining to breaks. If unchecked, break settings will default to being unpaid with no parameter settings.

Is It Paid

If checked, the employees will be paid for the time during their breaks. If unchecked, the timeclock will pause during the break.

Manager Override To End Break Early

If checked, management will be able to override the scheduled break time allowing the employee to return to duty early. If unchecked, the break will remain in effect until the designated allowable return time is reached.

Minimum Required Duration

This sets the minimum allowable duration for a break. Ending a break before this time will require management authorization.

Maximum Duration

This sets the maximum allowable duration for a break. Ending a break after this time will require management authorization.

Split Shift Clock Out Interval

If clock out interval between shifts is greater than this number (within the same work day), then it is considered a split shift. This could affect eligibility for certain shift rules.

Every

This sets the interval of minutes in which a break will come due. For example, a break is required every 180 minutes.

Alert In

This sets the alert time in which a message will display to the employee that they are coming due for a break. For example, alert the employee 5 minutes before their break that one is coming due.

Can Employee Waive A Break

- No - The break parameters set above must be followed.
- Yes With Manager Override - The break parameters can be overridden with manager authorization.
- Yes Without Manager Override - The break parameters can be overridden without manager authorization.
- Limit # of Waives - The maximum number of times (within a shift) that breaks can be waived. This field will only display if either of the Yes fields are selected.

Meal Break Enable

If checked, you will be able to set and apply the rules pertaining to meal breaks. If unchecked, break settings will default to being unpaid with no parameter settings.

Is It Paid

If checked, the employees will be paid for the time during their meal breaks. If unchecked, the timeclock will pause during the meal break.

Manager Override To End Break Early

If checked, management will be able to override the scheduled meal break time allowing the employee to return to duty early. If unchecked, the meal break will remain in effect until the designated allowable return time is reached.

Minimum Required Duration

This sets the minimum allowable duration for a meal break. Ending a meal break before this time will require management authorization.

Maximum Duration

This sets the maximum allowable duration for a meal break. Ending a meal break after this time will require management authorization.

Split Shift Clock Out Interval

If clock out interval between shifts is greater than this number (within the same work day), then it is considered a split shift. This could affect eligibility for certain shift rules such as meal breaks.

Every

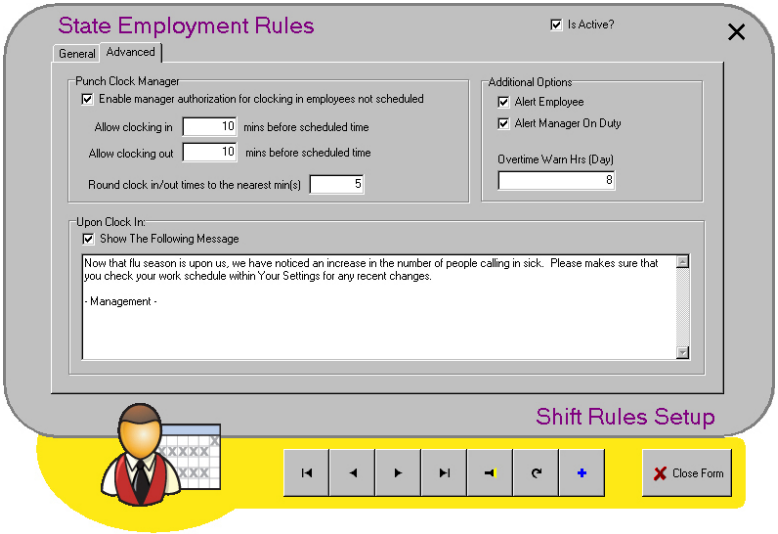
This sets the interval of minutes in which a meal break will come due. For example, a meal break is required every 300 minutes.

Alert In

This sets the alert time in which a message will display to the employee that they are coming due for a meal break. For example, alert the employee 5 minutes before their meal break that one is coming due.

Can Employee Waive A Break

- No - The meal break parameters set above must be followed.
- Yes With Manager Override - The meal break parameters can be overridden with manager authorization.
- Yes Without Manager Override - The meal break parameters can be overridden without manager authorization.
- Limit # of Waives - The maximum number of times (within a shift) that meal breaks can be waived. This field will only display if either of the Yes fields are selected.


State Employment Rules
Is Active?
General
Advanced
Punch Clock Manager
Enable manager authorization for clocking in employees not scheduled
Allow clocking in
10
mins before scheduled time
Allow clocking out
10
mins before scheduled time
Round clock in/out times to the nearest min(s)
5
Additional Options
Alert Employee
Alert Manager On Duty
Overtime Warn Hrs (Day)
8
Upon Clock In:
Show The Following Message
Now that flu season is upon us, we have noticed an increase in the number of people calling in sick. Please makes sure that you check your work schedule within Your Settings for any recent changes.
- Management -
Shift Rules Setup
Close Form

Allow Clocking In

If activated, this field entry will allow the employee to clock in this number of minutes before their scheduled work shift time. If they attempt to clock in earlier than this, the system will require manager authorization in order to do it.

Allow Clocking Out

If activated, this field entry will allow the employee to clock out this number of minutes after their scheduled work shift time. If they attempt to clock out later than this, the system will require manager authorization in order to do it.

Alert Employee

The employee will be sent a warning bulletin that they are approaching overtime.

Alert Manager On Duty

The manager on duty will be warned through the Rules Status screen that the employee is approaching overtime.

Overtime Warn Hours

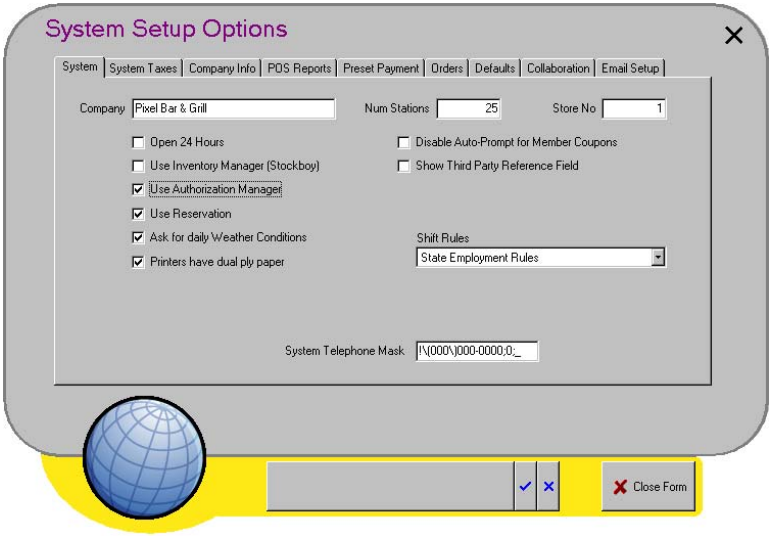
This is the number of hours the employee is allotted within a work day.

Upon Clocking In

This message will display when the employee clocks in.

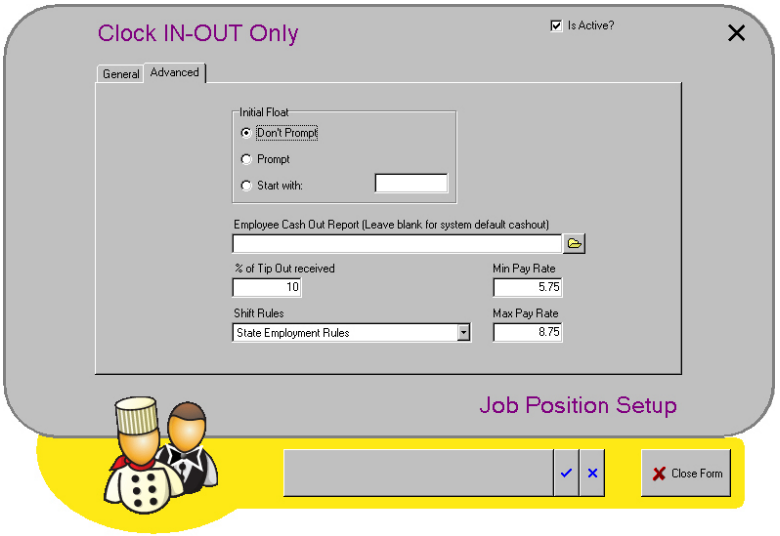
Where Shift Rules Are Applied

Global Assignment



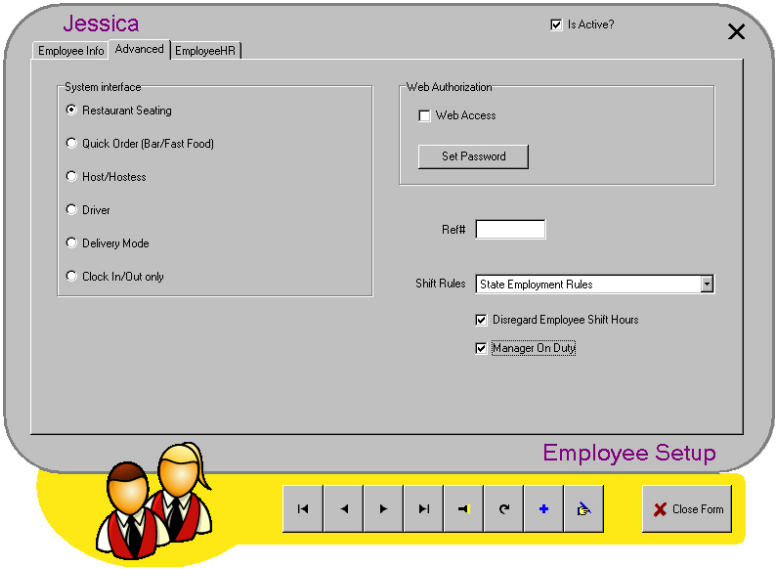
The field for assigning a Shift Rule to all employees is located on the System tab of Setup System found in the Administrator pull down menu.

Job Position Assignment



The field for assigning a Shift Rule to employees within a job position is located on the Advanced tab of Job Position Setup found in the Employees pull down menu.

Employee Assignment

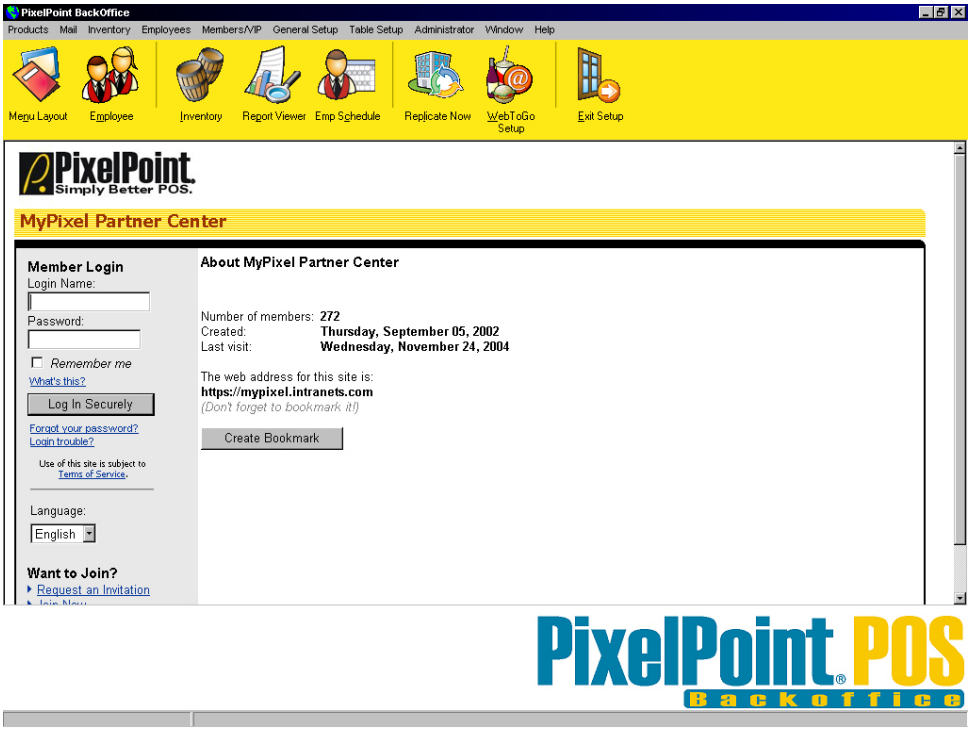


The field for assigning a Shift Rule to a specific employee is located on the Advanced tab of Employee Setup found in the Employees pull down menu.

Collaboration

Employees / Collaboration

This will turn the collaboration screen on and off. Upon leaving BackOffice and returning, the system will default back to having it turned on.

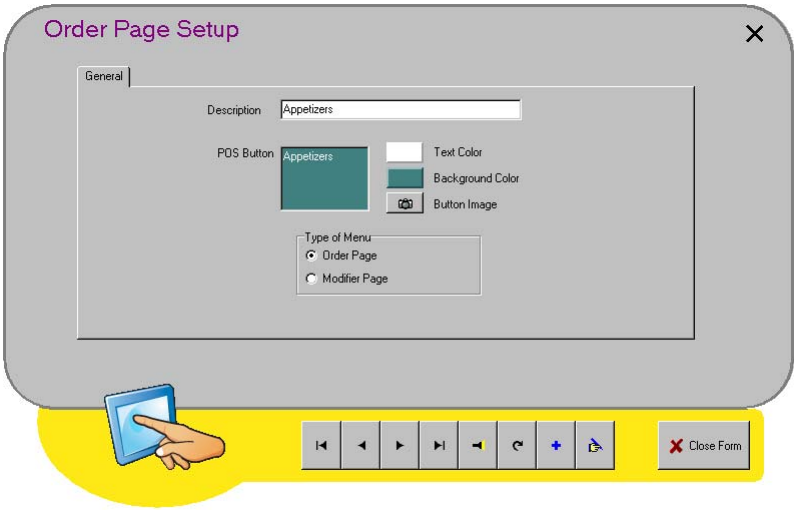


Products

Order Page Setup

Products / Order Page Setup

Order pages are used to access groups of products. They are accessible from either the Order Page Grid or the Modifier Page Grid. Selection of an order page will change what appears in the Product Grid.



Description

This is the description of the Order Page. Pressing the [TAB] key will apply this descriptor to the POS Button.

POS Button

This is the title that prints on the touch screen button. This description is intended for the server placing the order. There is no limit as to the number of characters you can apply, but the displayed contents will vary based on the font size and selection applied within the Order Template setup. It is recommended that you leave this text left-justified to ensure proper spacing regardless of the applied font.

Text Color

This presents a color chart with which you can select the color of text that will display on the POS Button. You can choose from among 48 basic color tiles, or apply custom colors.

Background Color

This presents a color chart with which you can select the color of the background that will display on the POS Button. You can choose from among 48 basic color tiles, or apply custom colors. Do this by selecting [Define Custom Colors], pick a custom color box to modify, then select the desired color from the rainbow tablet and select [Add To Custom Colors].

Button Image

This allows you to apply a graphic image to the POS Button. The image will occupy the entire button display. If you wish to have both an image and text on the button, the text must be contained within the image. It is recommended that you use small images of around 100-150 pixels. Square images appear best though the system will stretch the image to fit.

Type of Menu

Select whether the order page is for the Order Page Grid or the Modifier Page Grid. Your selection will determine whether the order page will be included in the pull down list of modifier pages when setting up Report Categories.

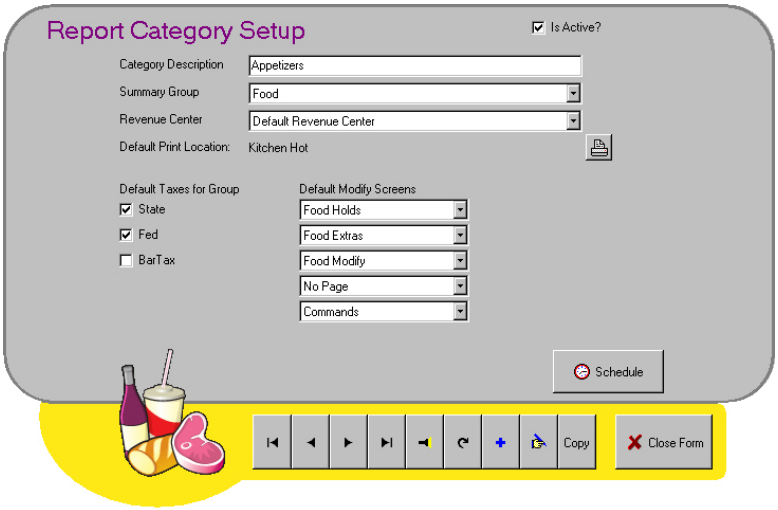
Report Category Setup

Products / Report Category Setup

A report category is a grouping of similar products. It is the level between Summary Group (which is a general grouping of products such as Food, Beverage, Bar) and Product (being the individual item such as hamburger and apple pie).

The report category serves two functions. The first is for reporting purposes. A report category allows you to view sales activity to groups of related products (such as bottled beer sales or dessert sales). The information is more detailed than what a summary group could provide but broad enough to provide useful information covering multiple products.

The second function serves to reduce redundant programming. When a product is assigned to a report category, it inherits the information that was programmed into that report category. So common items requiring the same taxes, modifier pages and print location will simply inherit this programming when assigned to the report category.



Category Description

The name of the report category.

Summary Group

Select the summary group the report category would belong to. For example, an Appetizer report category would belong to the summary group Food rather than Beverage or Bar.

Revenue Center

If the establishment has multiple revenue centers, you can select which revenue center to apply the report category to.

Default Print Location

Select the desired print channel(s) for remote printing. For example, all appetizers may use the Kitchen (or Food) print channel whereas the Beer report category would print to the Bar print channel. It is not necessary to include the Local print channel here. This pertains to the remote prints only.

Default Taxes For Group

Select the applicable taxes for this report category.

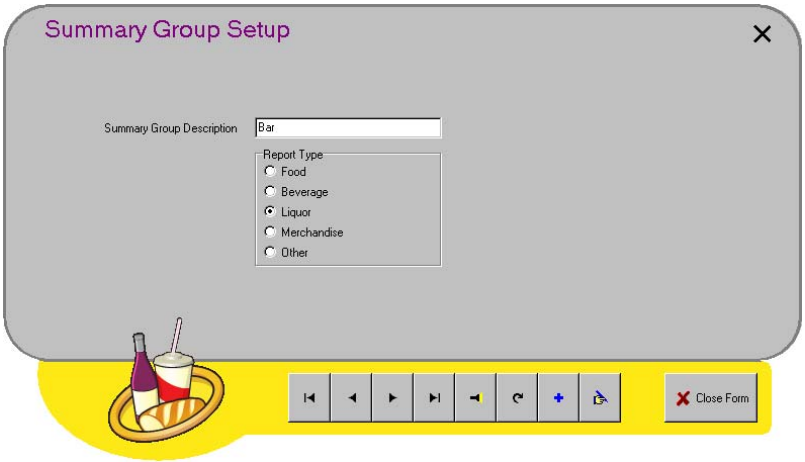
Default Modify Screens

This is where the buttons within the Modifier Page Grid are applied. When a product is ordered, the system will look to the report category it is assigned to and apply the modifier pages defined here.

Summary Group Setup

Product / Summary Group Setup

A summary group represents a very broad category for reporting similar items. Common examples of summary groups are
Food and Beverage. Items within a summary group can be further broken down into sub-categories referred to as Report Categories.



Summary Group Description

Description of the summary group.

Report Type

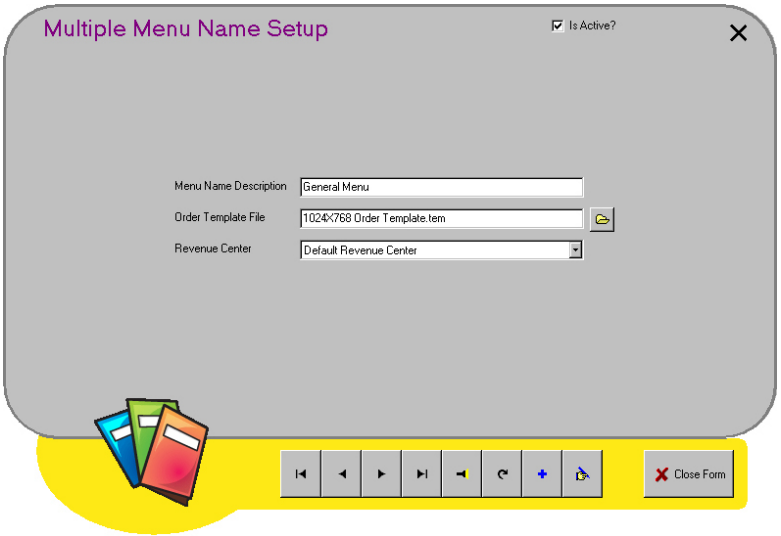
When generating a summary group report, the report type will group all summary groups together under its common title. For example, summary groups of Hot Food and Cold Food could both have the common report type of Food. When generating a summary group sales report, the totals for these two groups would be combined to give an overall Food total.

It serves a second purpose as well. Line items on the receipt will be sorted by Report Type. So all food items will be grouped together, all non-alcoholic beverages will grouped together and so on.

Multi Menu Setup

Products / Multi Menu Setup

The multi-menu function allows you to program completely separate menus for the POS. This is useful for situations where the establishment may have different revenue centers (such as one menu for the dining room and one for the lounge) or even more extreme applications such as an entire food court working on a single PixelPoint POS system.



Menu Name Description

Name of the menu.

Order Template File

The order template to be applied to this menu. Use the folder icon on the right to select the order template.

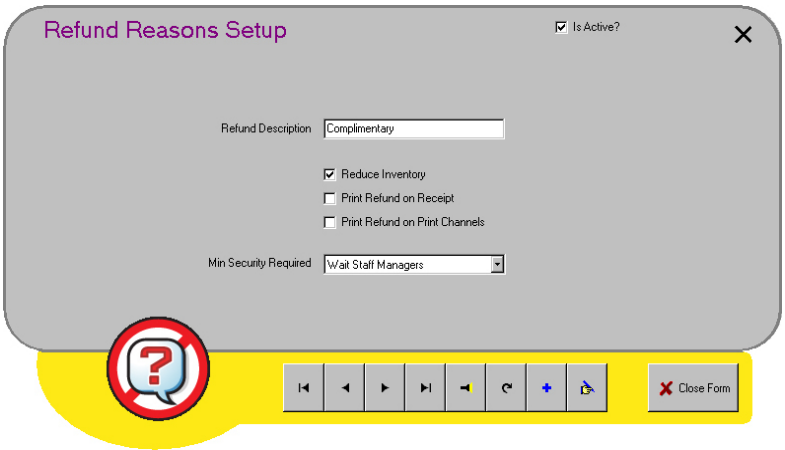
Revenue Center

Select the revenue center this menu will be assigned to.

Refund Reasons

Product / Refund Reasons

When voiding an item that has been Sent, the system will require that you provide a reason for removing the item by presenting you with a list of pre-programmed reasons. All voids will then be included in various management reports and categorized under their respective reasons.



Refund Description

Name of the refund type.

Reduce Inventory

Indicates that the item selected for refund will reduce inventory for that item.

Print Refund on Receipt

Determines whether to print the refund and its reason on the customer receipt.

Print Refund on Print Channels

Determines whether to print the refund and its reason to a remote printer that received the original order.

Min Security Required

Indicates the minimum job position required to approve the refund using this reason.

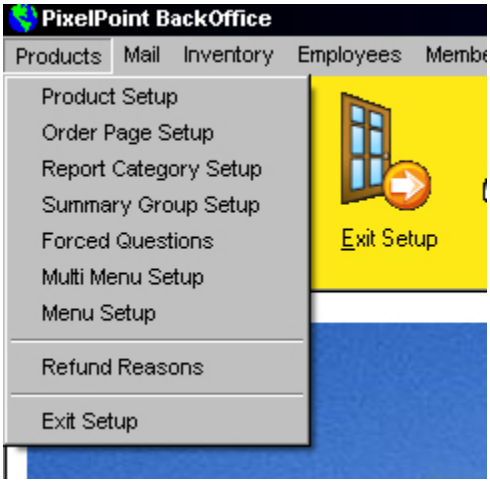
Open Drawer

There is a check box for opening the cash drawer if that reason is selected.

Exit Setup

Products / Exit Setup

This will close the BackOffice system. If you accessed BackOffice from the front-end, you will be returned to the front-end. If you accessed BackOffice from a Windows desktop shortcut, you will be returned to the Windows desktop



Glossary

D

Data: The information contained within a database record.

Database: A database is an organized body of related information. It is comprised of database tables which contain database records. It would be equated to a filing cabinet which contains drawers (database tables) which in turn contain file folders (database records).

Database Record: A database record is a row of data contained in a database table. For example, the record for 'John Smith' would contain data pertaining to that person. It would be equated to a file folder contained in a filing cabinet drawer.

Database Table: A database table is a file comprised of related records such as a table of employees, taxes or products. It would equate to a drawer within a filing cabinet.

F

Forced Question: A forced modifier. The user must answer the question in order to successfully order an item. For example, when ordering a salad the system automatically asks you to choose a dressing.

I

Inherit: To receive settings from a preceding function.

Intranet: An internet-based network. An intranet site is a website that requires a username and password to access. Upon doing so, you have access to company-related links such as a bulletins, documentation and schedules.

O

Option: A product modifier.

P

Product: A menu item. However, you can also create other items that are not food and beverage items such as rentals, minimum charges and commands.

R

Rated Item: A rental.

S

Split Check: When the customer requests "separate checks", this is the situation where you split the check into several smaller checks.

Split Modifier: Dividing the modifier into several smaller portions. For example, a half-&-half pizza.

W

WebToGo: PixelPoint's web-based ordering system. It allows customers to browse the menu and place orders for take out or delivery.

Index

2

24hour 143

A

A/R Module For Accounts 246
Accounting Code 56, 176
Active And Inactive Records 15, 137
Active Date Range 60, 94
Active Surcharge 60
Add Shift 32, 39
Add Spillage/Waste 5, 111, 122
Adjusted Units 115
Administrative Set Up 133
Administrator
- Administrator / Order Templates 180
- Administrator / POS Functions 175
- Administrator / Setup Network Printers 189, 191, 192
- Administrator / Setup Payment Methods 176
- Administrator / Setup Printer Channels 186
- Administrator / Setup Printer Codes 187
- Administrator / Setup Revenue Centers 172
- Administrator / Setup Sales Type 173
- Administrator / Setup Stations 161, 164, 166, 167, 171
- Administrator / Setup System 143, 146, 147, 148, 150, 154, 156, 158
- Administrator / WebToGo Setup 197, 198, 200, 201, 202, 203, 204, 205, 206, 207, 208, 209, 210, 212

Administrator 3, 5, 16, 39, 89, 90, 133, 138
Administrator 226
Administrator 251
Advanced Tab 27, 60, 67, 94, 102, 167, 176, 220, 243
Alert Manager On Duty 251
Alien Card 27
Allow
- Allow Clocking In 251
- Allow Clocking Out 251
- Allow Internet Orders 197
- Allow Multiple 71
- Allow Other Category Coupons 94
- Allow Other Product Coupons 94
- Allow Partial 102
- Allow Pay Ins/Pay Outs 150
- Allow Retip 176
- Allow Sale Type On Web 173

Always Print on Receipt 176
Amount Off 94
Apply Only Once If Multiple Products Found 94
Arrow Buttons 180, 221
Ask At Once 5, 71
Assign Card 27, 84
Authorization Manager 246
Authorization Required 176
Authorization Types 176
Auto Apply Coupon 237
Auto Apply Preset Payment 150
Auto Gratuity 154
Auto Logout In Seconds 161
Auto Order Item 60, 67, 94, 173
Auto PO 102, 111, 115
Automatic OK 71, 76

B

BackOffice 5, 9, 12, 15, 90, 111, 122, 129, 132, 133, 137, 143, 158, 180, 197, 232, 246, 257, 266
BackOffice Manager 3
BackOffice News Support 5, 9, 129
Balance On Cashout 150
Balance On End Of Day 150
Banner Message 133, 230, 246
Bar Code 102
Bar Interface 246
Barcode 94
Billboard Message 246
Break 251
Break button 71
Broadcast Message 124
Buddy Ordering 198
Bussing 53

C

Card Prefixes 176
Cash Drawer 246
Cash Drop 246

Cash Out 150, 164, 243, 246
Cash/currency 212
Cashouts 148
Catering 173
Change Date 90
Change Printer 20
Change PunchClock Times 246
Change Table Number 221
Change Table Section 221
Change Text 180
Charge Gratuity 180, 246
Charge Slip Printer 164
Charge Tip 246
Charges 246
Check/Receipt
Reprint 246
Check/Receipt 246
Client Points Coupon 94
Client Retention 82
Clock In 246
Clock In/Out Only 27
Clock Out 243, 246
Code
Accounting 56, 94, 146, 176
Marketing 94, 213
Code 56
Code 94
Code 146
Code 176
Code 213
Collaboration 158, 257
Combos 76
Company Info 5, 147
Consolidate On Orders 47, 189
Container/Package 102
Copy All Schedules 39
Copy Schedule 34, 39
Cost Each 115
Cost/unit 115
CountDown 246
Coupon 94, 208, 213
Course 192
Course Sorting 47
Cover Charge 53
Create Order Page 78
Create Product 78
Create Recipe Item 102
Create Splits 180
Credit Card 176
Credit Card Number 246
Credit Limit 84
Credit/Account Cards 176
CreditCheck 143, 167, 194
Custom Function Buttons 180
Custom Receipt 171

D

DataMiner 5, 24, 99, 102, 232, 246
Debit Card 176
Delay 53, 67
Delay Print Command 53, 60
Delete Break 32
Delete PO 111, 115, 246
Delete Shift 32, 34, 39
Deliveries 47, 87, 173
Delivery Driver 27
Delivery Mode 27, 173
Delivery Zone 84
Delivery/PickUp Times 210
Department 26
Detailed Order Info 180
Disable Auto-Gratuity 167
Disable Cash Drawer Opening 176
Disable Floor Zoom IN/OUT Buttons 167
Disable Save/Get Check Function 167
Disable Transaction View 167
Discount 94
Display Background 221
Disregard Employee Shift Hours 27
DLL 67, 146, 176
Do Not Ask For Swipe 176
Do Not Send POS Announcements' 5, 243
Driver's License 27
Drive-Thru 167, 173

E

Easy-Add New Item 180
Email 5, 20, 39, 124, 158, 160, 204
Emp Tip Surcharge 176
Employee
Employee Access 246
Employee Card Number 246
Employee Cash-Out 148
Employee Points 242

Employee Scheduler 5, 160
Employee Set Up 133
Employee Shift 102
Employee Till Assignment 246
Employee Time Clock 5, 246
Employee 5
Employee 133
Employee 243
Employee 251
Enable On The Web 94, 213
End Of Day 143, 150, 154, 231, 246
Enforce Declared Cash Tips 243
Enforce Employee Lockout 218
Enforce Gratuity Amount When Closing Check 154
Enforce Rated Item Before Ordering 218
Exchange Rate 176
Exit POS Software 246
Exit Setup 246, 266

F

Feature Code 53, 60, 67, 167
Final Total 60, 67
Finish Sales 150, 246
Fixed Price 71, 94
Floor File 161
Floor Layout 167, 246
Floor Zoom 161
Fonts 166
Force Price 173
Force Tender Settlement 176
Forced Questions 5, 47, 71, 76, 133, 246
Fractional Ordering 246
Frame Delay 167
Front Desk 176
Full Meal 67
Function Menu 102
Future Orders 154, 246

G

Gender - Select 27
General Setup 5, 94, 133, 171, 226, 227, 228, 229, 230, 231, 232
Get Check 167
Get Shifts 32
Gift Cards 67
Gift Certificate 84
Good Performance 246

H

Header/footer 226
Help 9, 129
Hide From Floor Layout 218
Hold & Fire 67
Host/Hostess 27
Hours Preferred 27
How To Make 213
HR Tab 27

I

Initial Float 243
Input Stock 246
Internet Setup 213, 246
Intranet URL 158
Inventory 111
Inventory Item 58, 111, 115, 122
Inventory Manager 5, 99, 111, 122, 246
Inventory Usage 99
Inventory Without StockBoy 99, 102
Is Gift Certificate 84
Item Countdown 246
Item Information' 102

J

Job Position 5, 26, 27, 124
Joining 246

K

Kitchen Command 53, 156

L

Last Visit Date 87
Layout Font 221
Layout Res 221
Layout Settings 221
Licensing 90, 194
Liquor Weighing 102
Local Area Network 194
Local1 ..... 16, 138, 164
Login 12, 132, 167

M

Magnetic Card Reader Attached 161

Mail Message 124, 126
Manager Functions menu 148
Manager On Duty 27
Manual Keyboard 53, 198
Manual Login 161
Manually Entered Credit Card 246
Manually Entered Member Card 246
Marketing Code 94, 213
Marketing 94
Marketing 213
Max Coupon Amount 94
Maximum Allowable Splits 71
Maximum Charge 60
Maximum Duration 251
Maximum Value 198
Meal Break Enable 251
Mealtime 227
Member Company Setup 246
Member Concepts 82
Member Defaults Record 84
Member Group 47, 167
Member Invoices 5
Member Price Level 237
Member Setup 213, 246
Member/Delivery 180, 246
Member/VIP Auth 176
Menu Setup 78, 180
Message To Chef 53
Methods Of Payment Setup 213
Min Security 56
Min/Max Pay Rate 243
Minimum Charge 53, 60, 198
Minimum Price 94
Minimum Security Required 246
Modifier Grid 56, 180
Modifier Page 78
Modify Price 47, 71, 76
Modify Shift 32, 34, 39
Move Items 180, 246
Move Table 180, 246
Multi Menu Setup 78, 133, 263
Multiple Suppliers 5

N

Navigation Bar 13, 135
Negative Final Total 246
Net Total 60, 67
Network Printers Setup 246
No Authorization 176
No Printer' 189
No Tax 246

O

On Account 84
Online Help 5, 9, 129
Open 24 Hours 143
Open Cash Drawer 228
Order Of Programming 133
Order Page 180, 258
Order Status 194
Order Templates 133, 180, 246, 258
Overtime Warn Hours 251

P

Pause Inventory Depletion 111
Pay In 228, 246
Pay Out 228, 246
Payment Methods Setup 246
Payment Options 212
Payment Terms 108
Payment Type 176
PayOut 246
Percent Off 94
Performance Points Setup 246
Pick-Up 173
Pictures 200
Pixel News 9, 129
Pixel32.ini 146
PixelPoint DataMiner 5
PixelPoint's CreditCheck 84, 176
PixelPoint's TableTime 90
PixelPoint's WebTime 27
PLU Lookup 180
PO 111, 115
Points Rate 237
Pooling 243
Poor Performance 246
POS Functions 27, 175
POS Reports 148
POSSERVER 194
Post Inventory Usage 102, 246

PreAuth 167, 176
Prep Days 102
Prep Location 102
Preset Quantity 180
Price Level 60, 167
Price Look-Up 180
Print Always 47, 53
Print Bar Code 187
Print Channel 56
Print Consolidation 16, 138
Print Filter 191
Print Logo 171, 187, 226
Print Priority 192
Print Receipt 161, 180
Print Refund on Print Channels 264
Print Refund on Receipt 264
Printer Channel 16, 138
Printer Codes 187, 189
Printer Manager 246
Printer Redirection 189
Printers Have Dual Ply Paper 143
Process Variance 120
Processing Delay 210
Product Concepts 46
Product Menu
- Product Setup .. 16, 47, 53, 60, 67, 71, 78, 99, 111, 133, 138, 146, 156, 167, 192, 213, 246
- Products / Exit Setup 266
- Products / Forced Questions 71, 76
- Products / Menu Setup 78
- Products / Multi Menu Setup 263
- Products / Order Page Setup 258
- Products / Product Setup 47, 56, 58, 60
- Products / Report Category Setup 260

Product Types 47, 53, 60
Punch Clock 246
Purchase Order 108, 111, 115, 120, 246

Q

Quantity button 71
Quick Order 27
Quick Order Table Num 167
Quick Service 173
Quick Unclose 180

R

Rated Items 246
Receipt Footer 226
Receipt Header 226
Receipt Printer 164
Receipt Setup 171, 246
Receive PO 111, 115, 246
Recipe 102
Recipe Item 53
Recipe Tab 58
Ref Code/UPC 53, 60
RefNum 239
Refund Reasons Setup 246
Regions Setup 246
Re-Order 180
Reorder Button 246
Reorder Level 102
Report Category 46, 47, 56, 102, 111, 167, 192, 258, 262
Report Type 241, 262
Report Viewer .. 20, 56, 99, 102, 120, 232, 239, 246
Reports 148
Reprint 246
Re-Print Checks 246
Reservations 90, 246
Response Mail 124, 126
Retail 167
Retip 246
Return Exchange Item 180
Returns 60, 180
Revenue Center 94, 161, 218, 260, 263
Roll-up Price 47
Round Down 102
Round Up 102
Rules Status 251

S

Sale Auth 167, 173, 176
Sale Type 47, 161, 167
Sales Functions 148, 150
Save Check 167
Schedule Future Order 246
Scheduler 34
Seat Number 180
Seating Position 156, 192, 198
Section Markers 221
Sections window

Table Layout Screen 218
Sections window 218
Security Level 94
Security Level Definitions 246
Sell
Gift Cards 67
In Items 246
Out Items 246
Sell 67
Sell 246
Send All Schedules 39
Send Command 53
Send Mail 124, 246
Send Order 180
Send Schedule 39
Separate Job For Each Item 192
Set Custom Function 180
Set Employee Access Card 246
Setup
Setup Billboard Message 133, 229
Setup Companies 239, 246
Setup Coupons 94, 133
Setup Delivery Zones 240, 246
Setup Departments 133, 241, 246
Setup Employees 27, 133, 246
Setup Job Positions 133, 243, 246
Setup Member Groups 237, 246
Setup Members 83, 84, 86, 87, 89, 246
Setup Network Printers .. 16, 47, 133, 138, 246
Setup Overview 5, 9, 129
Setup Payment Methods 133, 176, 246
Setup Printer Channels 133, 186, 246
Setup Printer Codes 187, 226, 246
Setup Receipt 133, 226
Setup Recipes 111, 246
Setup Revenue Centers 133, 172, 246
Setup Sales Type 133, 173, 246
Setup Security Levels 133, 246
Setup Shift Types 34, 39
Setup Stations 133, 161, 186, 226, 246
Setup System 5, 39, 90, 133, 143, 246, 251
Setup Table Layout 133, 221
Setup Table Sections 133, 218
Setup 5
Setup 34
Setup 39
Setup 78
Setup 133
Shift
Adding 39
Adding/Modifying 44
Schedule Tab 39
Shift 39
Shift 44
Shift Rules 5, 27, 243, 251
Shift Times 44
Shift Type 34, 39
Show Active Records Only 15, 137
Show Calculated Tender Amt 176
Show Products From All Revenue Centers .. 78
Show Third Party Reference Field 143
Shut Down System 246
Size-Down 60
Size-Up 60
Social Insurance Number 27
Social Security Number 27
Sold In 5, 243, 246
Sold Out 5, 60, 229, 243, 246
Sort Page Alphabetically 78
Specials 60, 84, 94, 229
Spillage 122
Split Check 246
Split Shift Clock Out Interval 251
SQLPOS 148
StaffTime 27, 34
Start Quick Order Mode 167
Start Quick Order Mode In Transaction View 167
Station Depletion By Warehouse 109
Station Has Magnetic Card Reader Attached 161
Station Has 161
Station Options 161
Station Setup 3, 16, 109, 138, 189, 221, 237, 246
Stock Adjustment 246
Stock Count 120
Stock Depletion 102
Stock Item Setup 246
Stock Levels 246
StockBoy 58, 99, 102, 143
Stop All Timers 53, 246
Sub-Recipe 5, 102
Suggested Selling Price 58
Summary Group 46, 260

Supplier Setup....108, 111, 246
System Setup.... 9, 129, 213, 246
System Taxes....146
System Telephone Mask....143
Systems Administrator....3

T

Tab Cards....220
Table Info....221
Table Layout....9, 53, 129, 221, 229, 246
Table Management....27
Table Sections....246
Table Settings....133, 220, 246
Table Setup....90, 133, 218, 220, 221
Tables
  Closing....246
  Joining....246
  Moving....246
  Tagging....221
Tables....90
Tables....221
Tables....246
TableTime....143
Tagging
  Products....78
  Tables....221
Tagging....78
Tagging....221
Take Out....167, 173
Tare Weight....60
Tax Exempt....60
Tax Inclusive Pricing....67
Templates....180
Tender Balancing....150, 176, 246
Third Party Reference Field....143
Ticket Number....53
Till Assignment....246
Till Close....39
Till Employees....27
Time To Serve....53, 60, 67
Timeclock....251
Time-Clock Manager....32, 246
Tip Out Received....243
Tip Pool....243
Tip-Out Report....243
Training Mode....246
Transaction Viewer....246
Transfer Check....180
Transfer Table Ownership....246

U

Un-Close Check....246
Universal Product Code....94
UPC barcode....60
URL 158
Use Buttons....71
Use Dividing Line....192
Use Inventory Manager....143
Use Reservation....90, 143
Use Schedule Pricing....167, 173
Use Separate Job....192
Uses Menu....161

V

Variance By Warehouse....109
VAT 67
View Change Log....32
View Current Day Sales....246
View Guests....246
View Response Mail....126, 246
View Stock Levels....111
Void Entire Check....180
Void Item....180

W

Wait Staff Normal....198
Warehouse Depletion....167
Warehouse General....115
Warehouse Transfer....115
Waste....122
Weather Conditions....231, 246
Website Setup....89, 197
WebToGo. 82, 89, 94, 173, 194, 197, 202, 205, 213
Week Start Day....34
Weighed Item On Scale....60
Weight Of Ounce....102
Who Is Here....246

Y

Your Settings....27, 150, 246

Z

Zero Scale Of Bottle 102
Zoom In 167
Zoom Out 167